# Contents

# Administrator Guide for Dynamics 365 Customer Engagement

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

> **NOTE**
> This content is for Dynamics 365 (online), version 9.0, or later. For documentation for earlier versions, see Administering Dynamics 365.

Implementers and administrators for Dynamics 365 will find the resources and topics provided in this guide to help you manage and configure Dynamics 365 Customer Engagement applications and services.

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**See also**

Customization Guide
Developer Guide
Reporting and Analytics Guide

# Release history for Administrator Guide

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Applies to Dynamics 365 (online), version 9.x

This is the release history page for the Administrator Guide for Dynamics 365 Customer Engagement documentation. Note that some of the updated and new topics relate to changes made since the last product release and are not exclusive to Dynamics 365 (online), version 9.0.

Check out the following for more "What's new" and release history information:

- What's new in Dynamics 365

**TIP**

To see the versions that apply to the updates below, see Support: Dynamics 365 (online) releases

## Dynamics 365 (online), version 9.0

| NEW AND UPDATED TOPICS | DESCRIPTION OF CHANGES |
| --- | --- |
| Public Preview: Introducing Live Assist for Dynamics 365 Powered by CaféX | Added new topic. |
| Configure Relevance Search to improve search results and performance | Updated topic. |
| Use Power BI | Updated topic. |
| Replicate data to Azure SQL Database | Added new topic. |

## Out-of-band topics

The following are topics for features that were delivered out of band since the prior product release.

| NEW AND UPDATED TOPICS | DESCRIPTION OF CHANGES |
| --- | --- |
| Purchase and assign Dynamics 365 (online) licenses | Added information about PowerApps licensing. |
| What's new with instance management | New topic. |
| Common Data Service instances | New topic. |
| User Guide (Dynamics 365 for phones and tablets) | Updated topic. |
| What's supported | Updated topic. |
| Enable accessible email flow | Added new topic. |

| NEW AND UPDATED TOPICS | DESCRIPTION OF CHANGES |
|---|---|
| Contact Technical Support | Updated topic for new ticket process. |
| Preview feature: Set up Cortana integration | Updated topic. |
| Use the Organization Insights solution to view metrics about your instance | Updated topic for version 1.3.0.1 |
| Invite users to Dynamics 365 with Azure Active Directory B2B collaboration | Added new topic. |
| About the Microsoft Cloud Germany datacenter | Added new topic. |
| Switch from Dynamics CRM Online to Dynamics 365 (online) | Updated topic. |
| Manage Support instances | Added new topic. |
| Security enhancements: User session and access management | Added new topic. |

# Getting started

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Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

As a Dynamics 365 administrator, you'll find the information that you need here to get your organization started with Dynamics 365.

# Terminology used in the product and documentation

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Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The following are terms used throughout the Dynamics 365 (online) product and documentation.

| TERM | DEFINITION |
| --- | --- |
| Tenant | For Dynamics 365 (online), a tenant is the account you create in the Microsoft Online Services environment when you sign up for a Dynamics 365 (online) subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple Dynamics 365 (online) instances.<br><br>The tenant created for you has a domain name of <account>.onmicrosoft.com. For example, contoso.onmicrosoft.com. |
| Instance | When you sign up for a trial or purchase a Dynamics 365 (online) subscription, a Dynamics 365 (online) production instance is created. Each additional production or non-production (Sandbox) Dynamics 365 (online) instance you add creates a separate and isolated Dynamics 365 organization on the same tenant.<br><br>An instance has the URL format: https://<URL name>.crm.dynamics.com. For example, https://contososales.crm.dynamics.com. |
| Multiregional instance | An instance in a different region than where your Dynamics 365 (online) tenant resides. Local instances can provide quicker data access for users in that region. More information: Add and edit multiregional instances |
| Subscription | A subscription consists of the Dynamics 365 licenses and add-ons included with the trial or paid service you signed up for in your Dynamics 365 (online) account. Dynamics 365 subscriptions can vary in license type, price, and end date.<br><br>For example, a subscription might be 100 licenses of Dynamics 365 (online) Professional and 10 licenses of Dynamics 365 (online) Enterprise. |
| Identity | The user account used to sign in to Dynamics 365 (online). You can also use this identity to access other Microsoft Online services, such as Office 365 or SharePoint Online. Administrators can decide if they want to federate user identity management between Dynamics 365 (online) and on-premises Active Directory. |

| TERM | DEFINITION |
| --- | --- |
| User account | A user account assigned by an organization (work, school, non-profit) to one of their constituents (an employee, student, customer) that provides sign-in access to one or more of the organization's Microsoft cloud service subscriptions, such as Exchange Online or Dynamics 365 (online). Access to an online service is controlled by the license assigned to the user account.<br><br>User accounts are stored in an organization's cloud directory within Azure Active Directory, and are typically deleted when the user leaves the organization. Organizational accounts differ from Microsoft accounts in that they are created and managed by admins in the organization, not by the user. |
| Security group | If your company has multiple Dynamics 365 (online) instances, you can use instance security groups to control which licensed users can access a particular instance. More information: Control user access to instances: security groups and licenses |

### See also

Manage Microsoft Dynamics 365 (online) instances

# Try Dynamics 365 (online)

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Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

We're excited about the release of Dynamics 365 (online), version 9.0 and hope you're eager to try it out. New and existing customers have different options to take a look at Dynamics 365 (online).

## Partners and Customizers

If you are a partner signing up on behalf of a customer, or are using this trial for development purposes, go to https://trials.dynamics.com/Dynamics365/Signup/#. You'll have the choice to add your trial to an existing tenant. You will also need to decide which apps to install when you start your trial. For more information on which scenario is right for you, see Installation options below.

## New Dynamics 365 (online) customers

If you're a new customer, we've made onboarding quick and easy. See the following for information on these applications available with Dynamics 365 (online).

- Dynamics 365 for Sales
- Dynamics 365 for Customer Service
- Dynamics 365 for Field Service
- Dynamics 365 for Project Service Automation

On any of the above pages, scroll down and click **Get Started** to start a 30-day trial. For more information on which scenario is right for you, see the Installation options section below.

## Current Dynamics 365 (online) customers

If you already have a Dynamics 365 subscription, there are a couple ways to see the latest version in action.

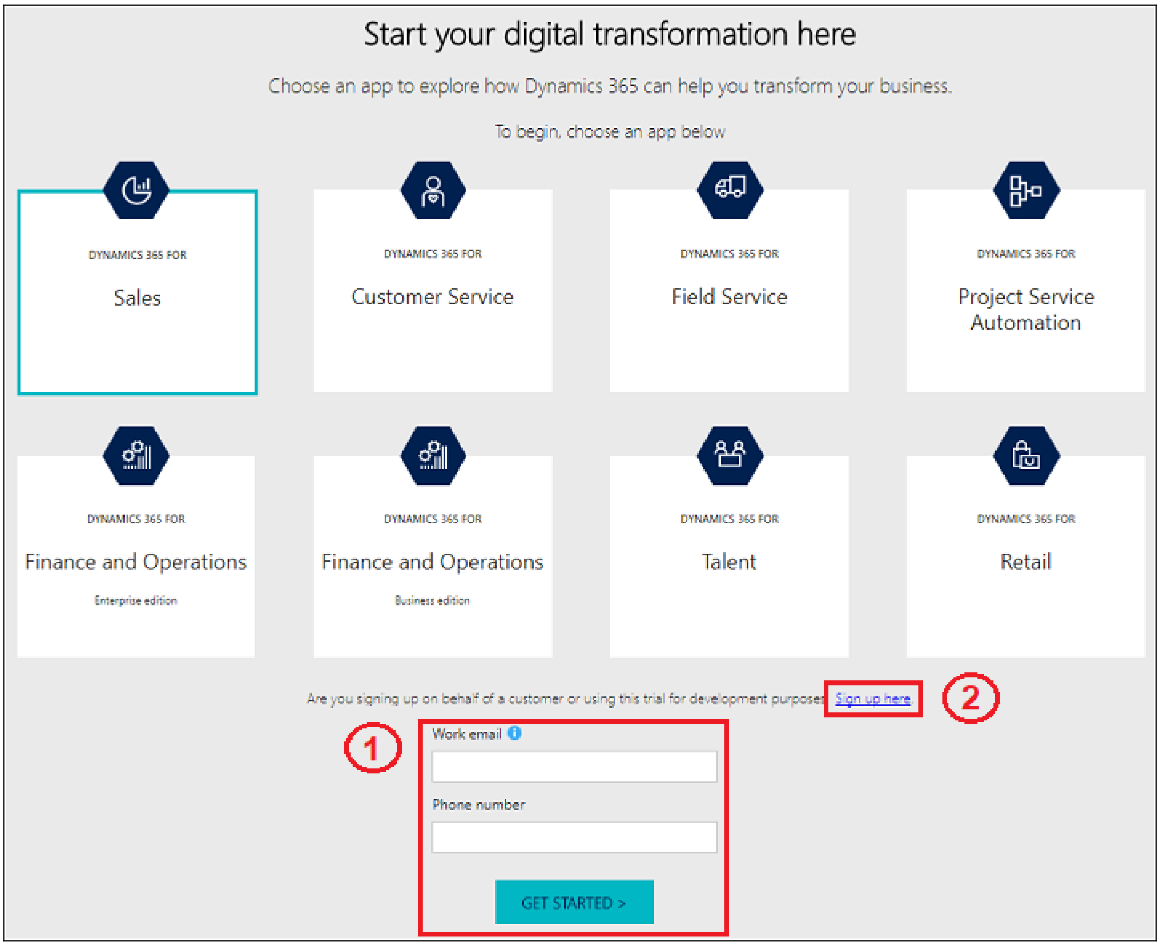
### Start a trial

You can start a 30-day trial of Dynamics 365 (online) and try out one or all of the customer engagement applications. This trial uses the Dynamics 365 Customer Engagement Plan license.

> **NOTE**
> You're allowed one trial per tenant. If you've already done a trial of Dynamics CRM Online or Dynamics 365 (online), you cannot do another trial. However, you can reset a Sandbox instance to the latest version or to one of the previous versions. See Use a Sandbox instance below.

**To start a trial**

1. Go to https://trials.dynamics.com/Dynamics365/Signup/




2. Choose an app. You can add more apps later.

3. If you are customer, fill in the information and choose **Get Started** (#1).

   -OR-

   If you are a partner signing up on behalf of a customer, or are using this trial for development purposes, choose **Sign up here** (#2).

For more information about the scenario choices, see the Installation options section below.

**TIP**

Check out the following videos:

- Get the most out of your free 30-day Dynamics 365 trial.
- How to buy Dynamics 365.

**Use a Sandbox instance**

If you already have a Dynamics 365 subscription, you can use a Sandbox instance to try the latest version of Dynamics 365 (online).

Follow these steps to set up a Sandbox instance of Dynamics 365 (online):

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

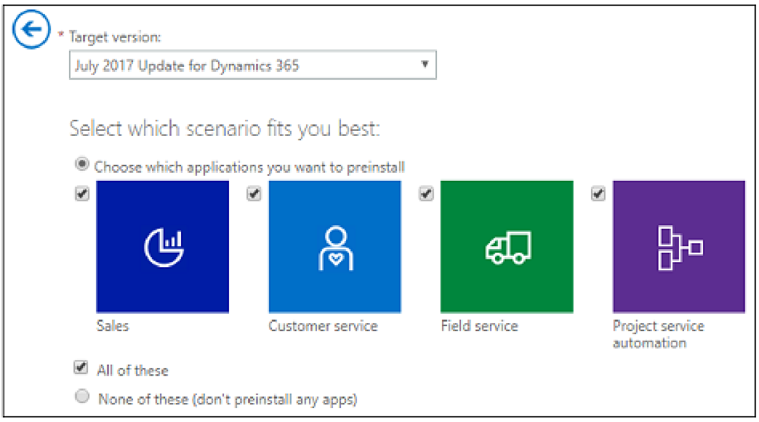
2. Click **Admin centers** > **Dynamics 365**.

3. Choose the **Instances** tab.

4. Select the Sandbox instance that you want to provision with the latest version of Dynamics 365 (online), and then click **Reset**.

5. Select the **Target version**, and then select Dynamics 365 (online).

   Select a scenario. For more information about the scenario choices, see the Installation options section below.

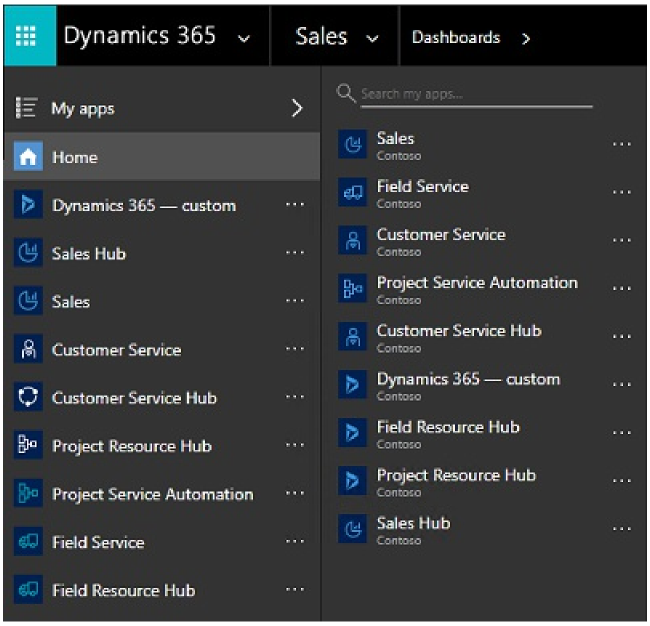



> **TIP**
> Choose the "None" option to have a blank slate for building your own custom application.

6. Click **Reset**.

# Installation options

You can choose to start a trial for all Customer Engagement offerings, a mix of offerings, or none. Each choice installs a different set of apps, which are displayed in the app switcher.




The following table shows what's installed for each choice, what you see in the app switcher, and where you can use it.

| INSTALLATION OPTIONS | APP MODULES INSTALLED/SHOWN IN APP SWITCHER | DESCRIPTION | AVAILABLE FOR |
|---|---|---|---|
| Sales<br>See: Sales Overview | Sales | Full-featured desktop-optimized app for sales scenarios | Web |

| INSTALLATION OPTIONS | APP MODULES INSTALLED/SHOWN IN APP SWITCHER | DESCRIPTION | AVAILABLE FOR |
|---|---|---|---|
| | Sales Hub | Mobile-optimized app for sales scenarios (Unified Interface) | Web and Mobile |
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |
| Customer Service<br>See: Customer Service Overview | Customer Service | Full-featured desktop-optimized app for service scenarios (does not include knowledge management capabilities) | Web |
| | Customer Service Hub | Desktop (recommended for knowledge management only) and mobile-optimized app (recommended for case management) (Unified Interface) | Web and Mobile |
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |
| Field Service<br>See: Field Service Overview | Field Service | Full-featured desktop-optimized app for field service scenarios | Web |
| | Field Resource Hub | Mobile-optimized app for field service scenarios (Unified Interface) | Web and Mobile |
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |
| Project Service Automation<br>See: Project Service Overview | Project Service Automation | Full-featured desktop-optimized app for project service scenarios | Web |
| | Project Resource Hub | Mobile-optimized app for project service scenarios (Unified Interface) | Web and Mobile |
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |
| All | All apps shown above | | |

| INSTALLATION OPTIONS | APP MODULES INSTALLED/SHOWN IN APP SWITCHER | DESCRIPTION | AVAILABLE FOR |
|---|---|---|---|
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |
| None | CRM Hub | Mobile-optimized app that provides core CRM functionality, including accounts, contacts, and activities (Unified Interface) | Mobile |
| | Dynamics 365 (online) - custom | Full suite of Dynamics 365 (online) Customer Engagement capabilities, including administration | Web |

## See also

Onboard your organization and users to Dynamics 365 (online)
Business apps in Dynamics 365
Manage Microsoft Dynamics 365 (online) instances
Manage subscriptions, licenses, and user accounts

# About Unified Interface

10/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

With the release of Dynamics 365 (online), version 9.0, we've introduced a new user experience - Unified Interface - which uses responsive web design principles to provide an optimal viewing and interaction experience for any screen size, device, or orientation.

The new Unified Interface brings all the rich experiences to any client that you are using. Whether you are on a browser, tablet, or phone, you will be able to consume similar experiences. Some examples:

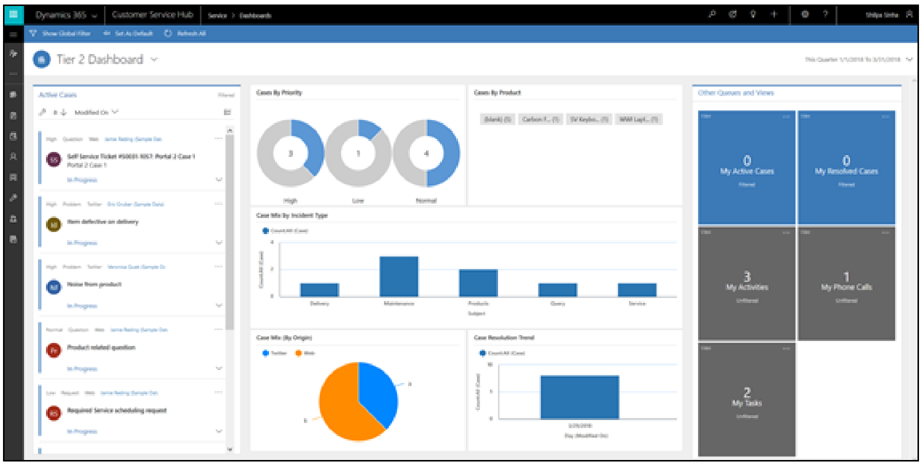
- Similar form experiences to update and view your records.
- Interactive dashboards across all devices to view your information and drill into it.
- Reference Panel is now available to be used with all entities supported in Unified Interface.
- We now support right-to-left (RTL) languages.
- All experiences on Unified Interface have accessibility improvements.

## Capabilities available in Unified Interface with Dynamics 365, version 9.0

Most of the core functionalities of sales and customer service have moved to the Unified Interface client.

### Dashboards and charts

You can access all the system and user dashboards from within your Unified Interface apps. The interactive dashboards are now available for all record types with richer interactive dashboard capabilities.




### Enhanced user experience

If users work on core record types like Activities, Accounts, Contacts, Leads, Opportunities and Cases, you'll be able to move them to the Unified Interface client.

They will have familiar capabilities on Unified Interface and will also discover productivity enhancements with the introduction of some enhanced capabilities.

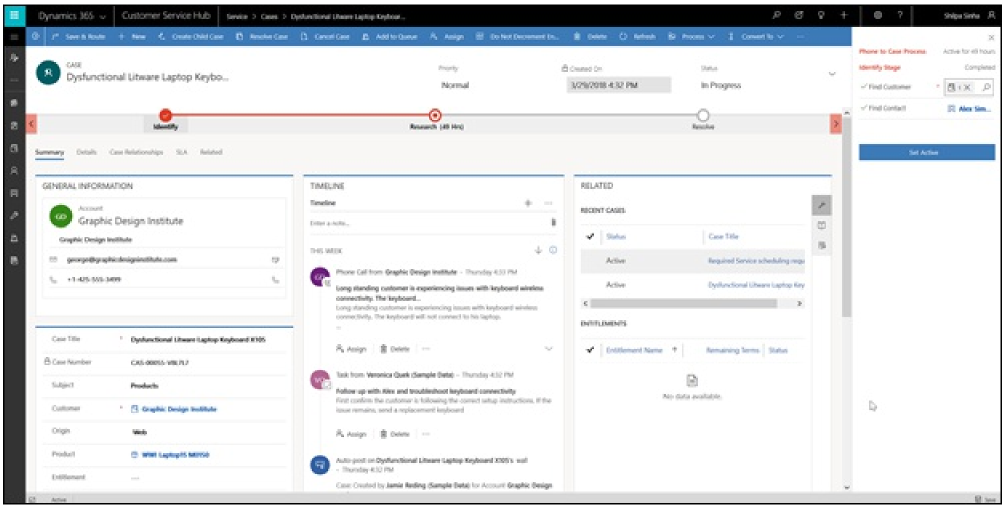
**Timeline control** - The timeline view helps you collaborate with your team by tracking customer communication in a record on a single page in an easy to read view. You can see everything from posts and voice attachments, to emails and notes. It provides a quick way to see the entire communication thread.

**Business process enhancement** - The business process flow has been improved by the docking mechanism. You can dock the business process stage on your screen to help you stay focused on the task at hand in your business process flow. This is especially useful when the stage of the process has complex steps to complete.

**Reference panel** - Use the reference panel for apps built on Unified Interface like Dynamics 365 for Customer Service. The reference panel is a great way to get work done without clicking away from the screen you are on. You can look up other things like knowledge base articles within the context of the record you are viewing.

**Navigation** - The new menu options let you swiftly navigate the different apps in the system. It provides quick access to recently viewed records and pinned favorites.

**Reflow** - The app also scales by reflowing the components on the screen. The responsive design adapts to your environment based on screen size, so the more available space that you have the more information can be displayed.




### Focused Experience

Unified interface experiences are based on model-driven apps. You can scope the user experience based on the jobs they need to accomplish. Users can have single or multiple apps based on their requirements and can easily switch between apps as needed.

### Rich controls

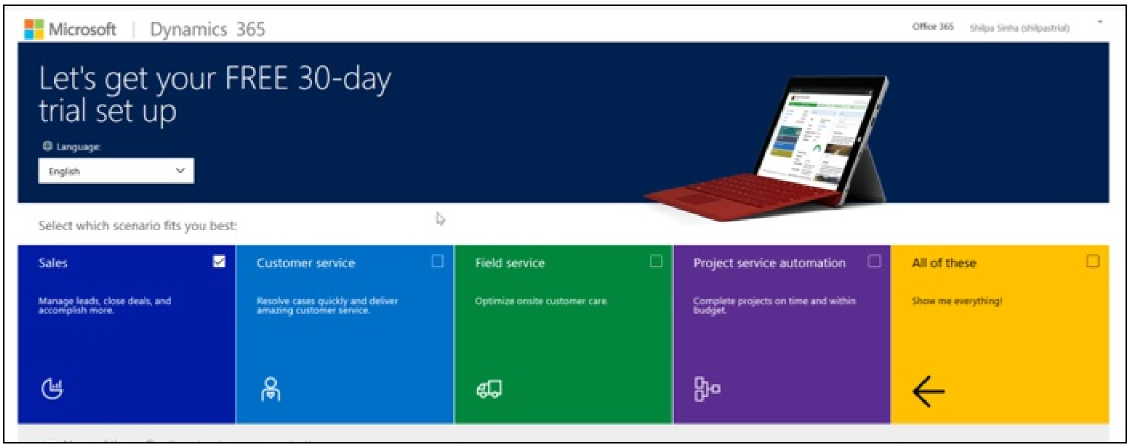
Unified interface is a metadata driven experience. All controls experiences are built on the control framework that is extensible and provides a uniform experience across clients. The app display reflows to the viewport size the user is working in.

## Getting started with Unified Interface experience

When you are provisioning a new Dynamics 365 org, depending on whether you are provisioning for Sales, Customer service, Field service, Project service automation, all the options, or an org with no customization, you will see the following Unified Interface apps:

| CHOICE WHILE PROVISIONING | UNIFIED INTERFACE APPS |
| --- | --- |
| Sales | Sales Hub |
| Customer service | Customer Service Hub |
| Field service | Field Resource Hub |
| Project service automation | Project Resource Hub |

| CHOICE WHILE PROVISIONING | UNIFIED INTERFACE APPS |
| --- | --- |
| None | Dynamics 365 Hub |
| All | All the above except Dynamics 365 Hub |

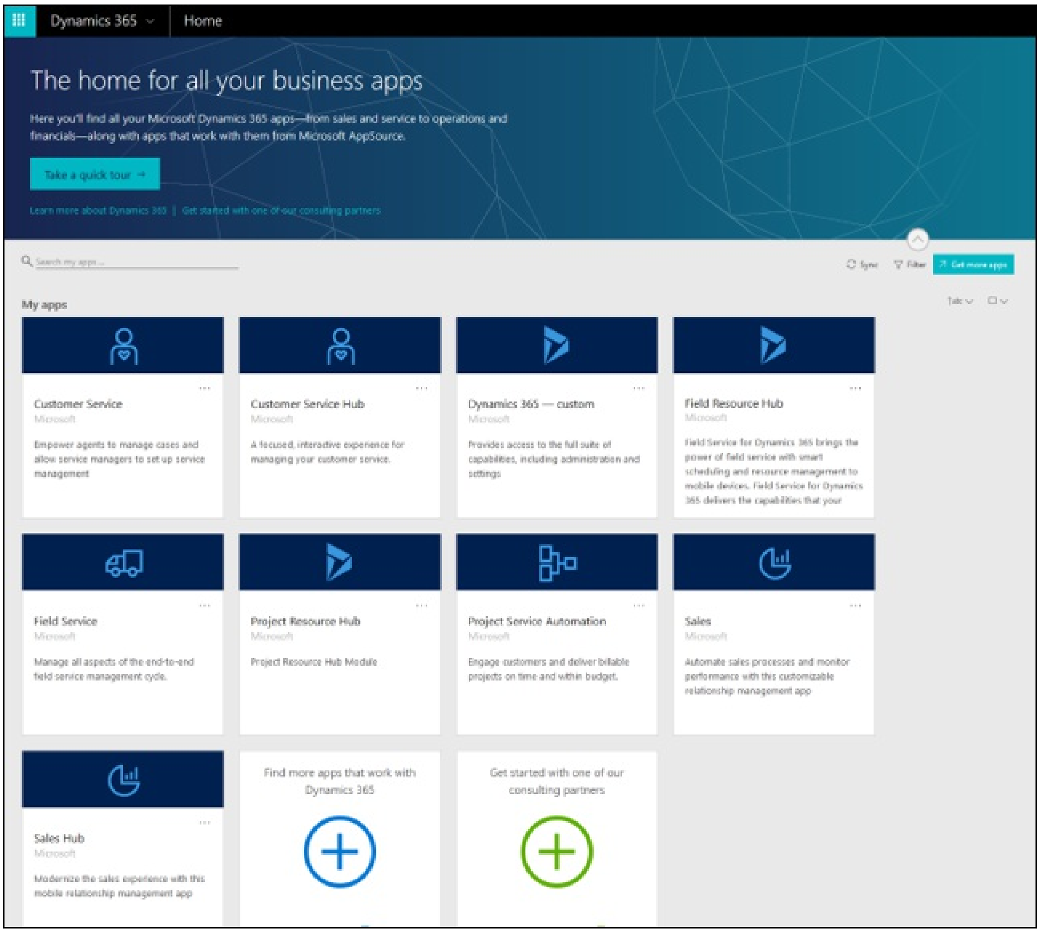



> **NOTE**
>
> Dynamics 365 for Marketing always uses the Unified Interface and is provisioned separately.

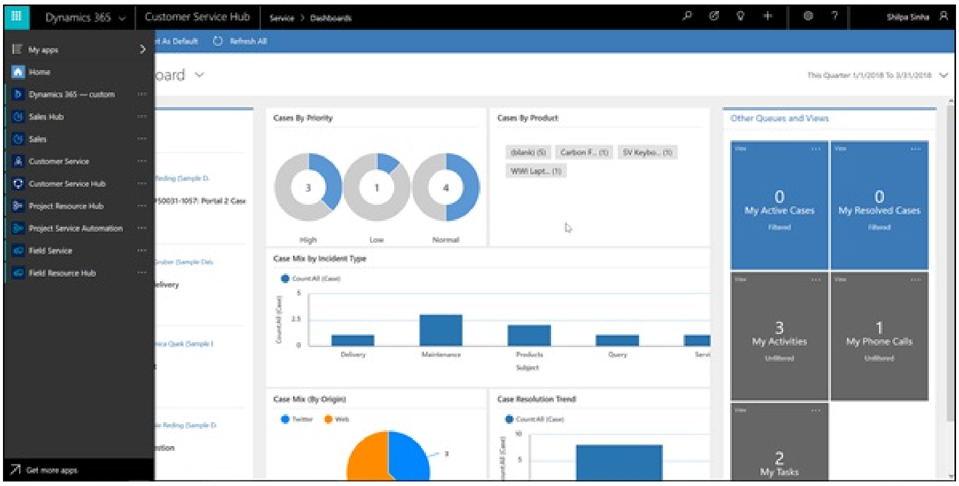
### Accessing Unified Interface apps on browsers

Once provisioned, you can access the installed Unified Interface and web apps from multiple interfaces. On browsers you can see all the apps both Unified Interface and web:

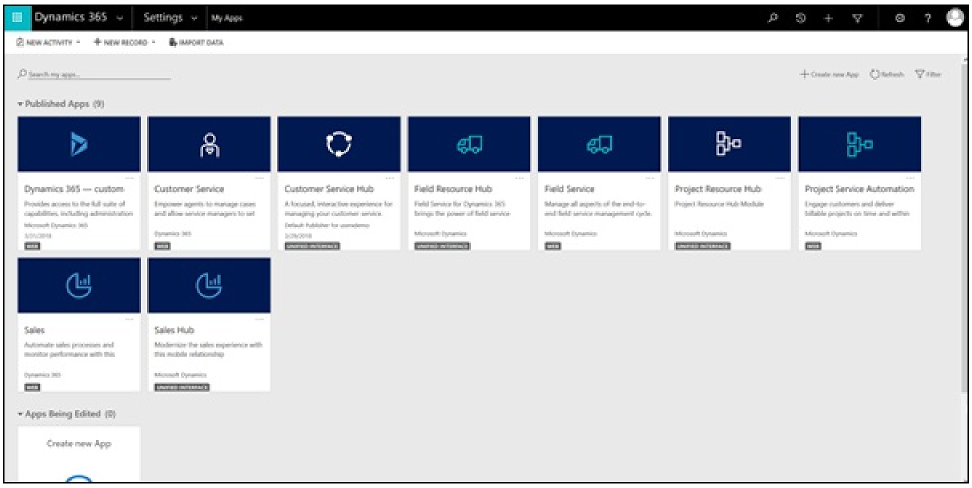
1. In https://home.dynamics.com/



2. In app navigation



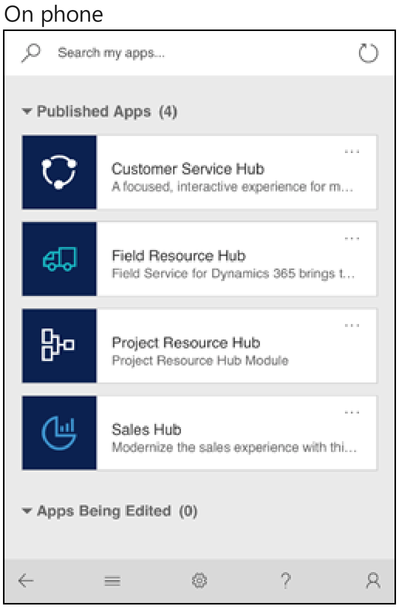

3. In My Apps page under Settings



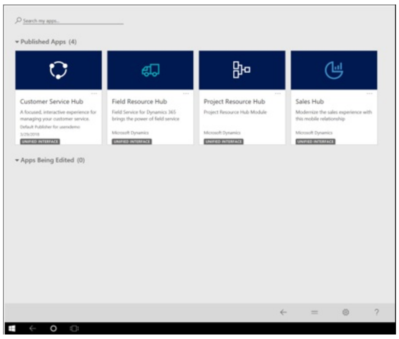

### Accessing Unified Interface apps on phone and tablets

Unified interface apps are the only apps supported on phones and tablets for Dynamics 365, version 9.0. When a user logs into the above org, they will only see the Unified Interface apps on their apps landing page.

On phone

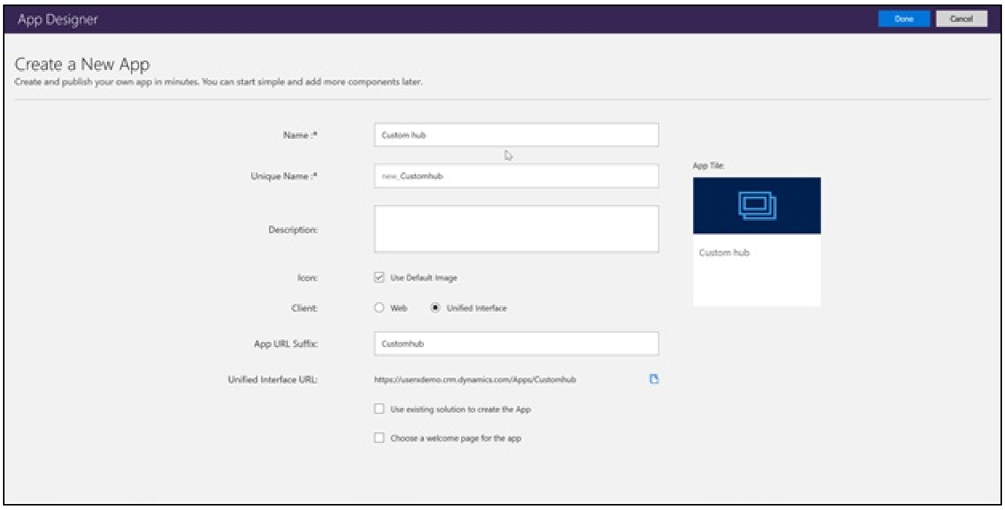


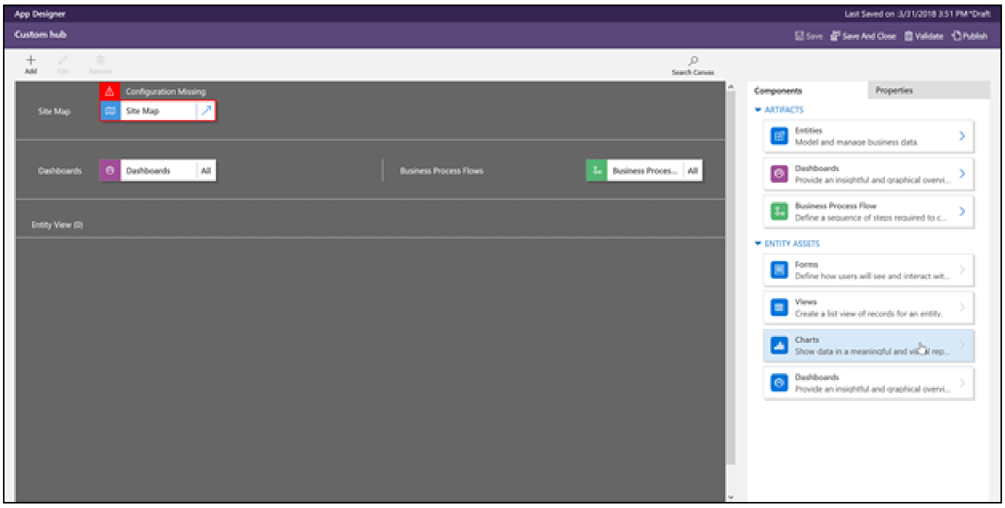

On tablet



### Creating a new Unified Interface app

In case you have requirements to create your own experience on Unified Interface, you can create a model-driven app using the app designer. See Overview of building model-driven apps.




## Capabilities not yet on Unified Interface

We released some capabilities of the legacy web client in the Unified Interface that are available in the hybrid experience. You can enable the hybrid experience to get them in the browser client.

There are certain capabilities that continue to be unavailable in the Unified Interface and we are working to provide these in future releases:

- Audit Trail
- Creating personal charts
- Custom styling of advanced chart properties (excluding colors and basic formatting)
- Reports entity (experiences to create and manage SSRS reports; excludes Run Report)
- Third-party search provider (Coveo search)
- Composite address control
- Letter, Fax, Recurring Appointments
- Campaign management – campaigns, campaign activities, marketing list, and quick campaign
- Global notifications
- Admin experiences
- Editable grids on phones
- Learning Path

## Read-only entities on Unified Interface

There are certain entities that are currently read-only on Unified Interface. Users will not be able to make changes to these entity records within an Unified Interface app. We are working to make them editable in future releases.

> **NOTE**
>
> Some entities are being deprecated. Check out Important changes (deprecations) coming.

The following are entities that are currently read-only in Unified Interface:

- Connection Role
- EmailSignature
- Entitlement
- KnowledgeArticleViews
- KnowledgeBaseRecord
- Queue
- SharePointDocument
- SharePointSite
- SLA
- SLAKPIInstance
- SystemUser
- Team
- Template

**See also**

Overview of building model-driven apps

# Enable the hybrid experience

9/5/2018 • 2 minutes to read • Edit Online

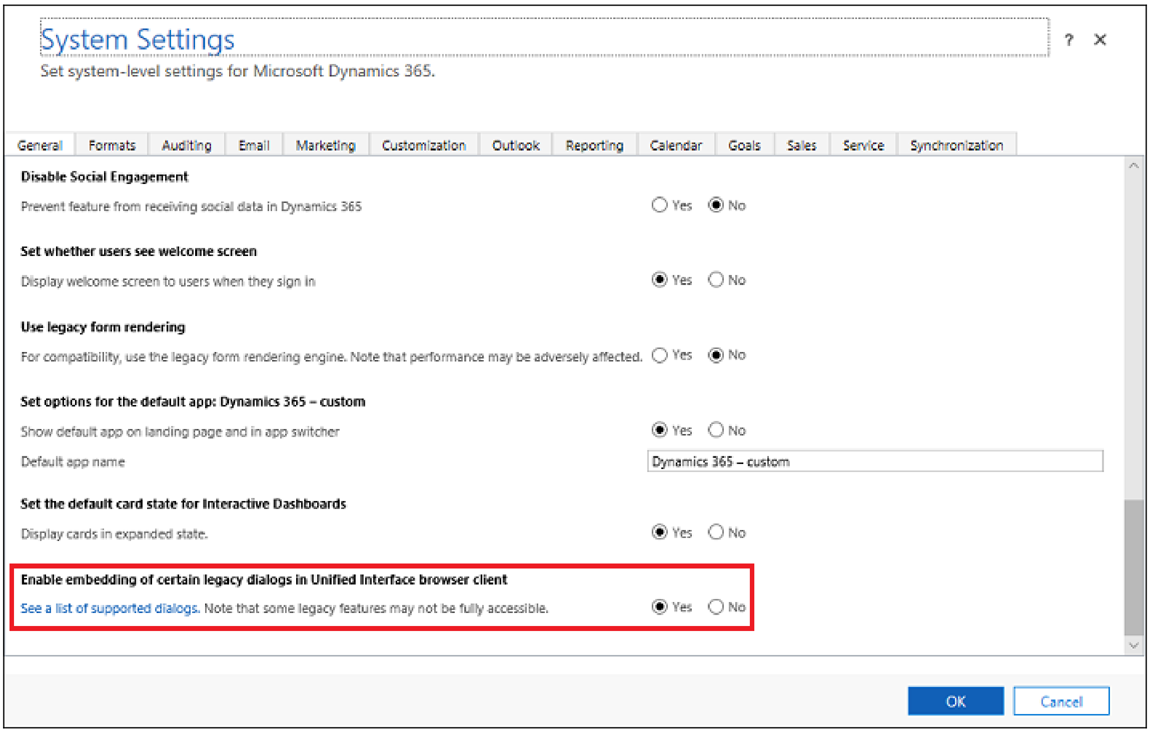
Most of the core functionalities of sales and customer service have moved to the Unified Interface experience. Some of the features that are not yet on Unified Interface can now be accessed in the Unified Interface client.

The following features are not yet present in the Unified Interface but can be enabled for display as legacy dialogs in the Unified Interface through the hybrid experience.

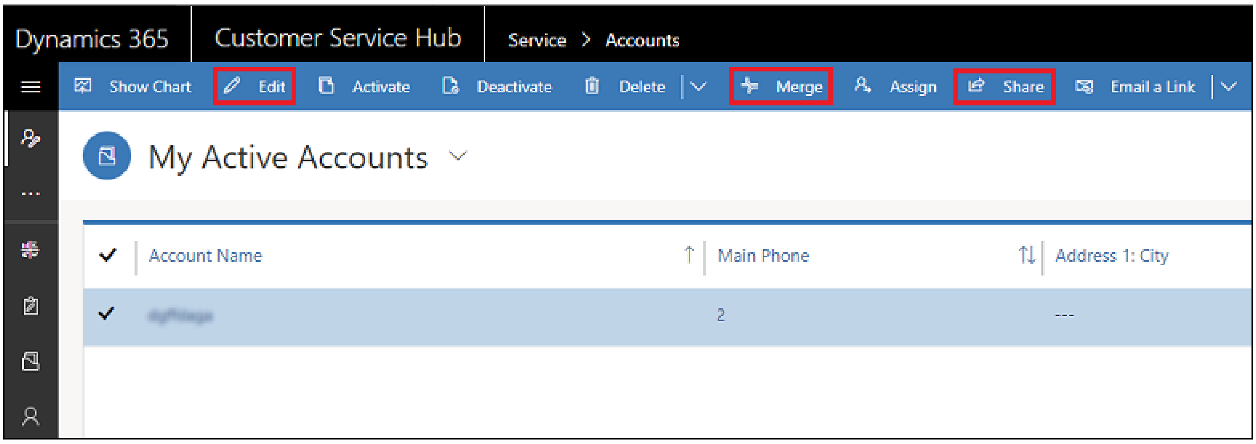
- Advanced Find
- Bulk edit
- Merge records
- Record sharing
- All options under **Set Personal Options** ()

These features are enabled through a setting in System Settings.

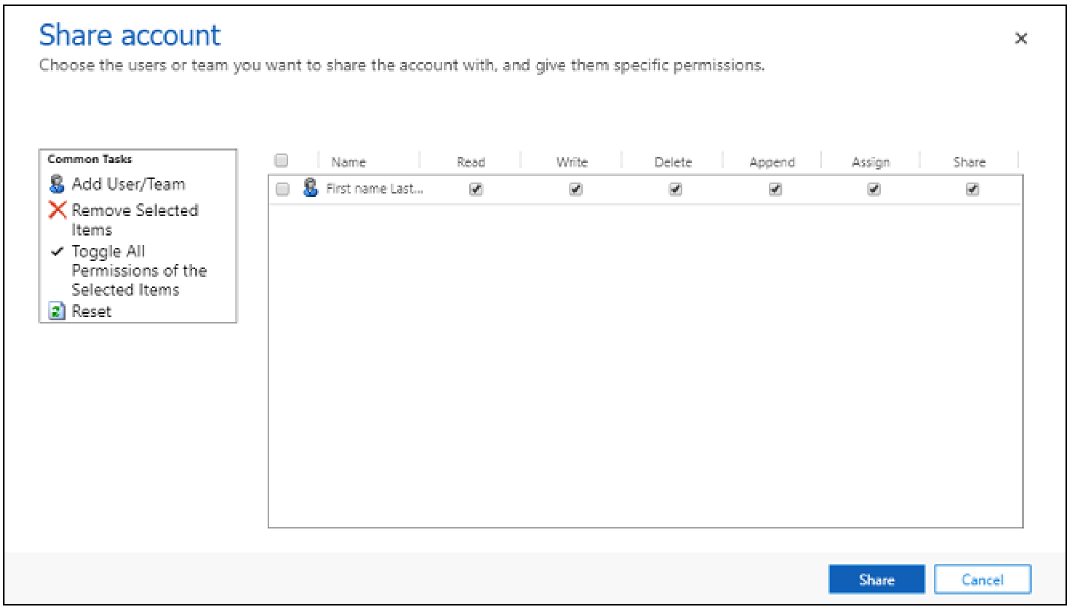
1. Go to **Settings** > **Administration** > **System Settings**.
2. Select the **General** tab.
3. Set **Enable embedding of certain legacy dialogs in Unified Interface browser client** to **Yes**.



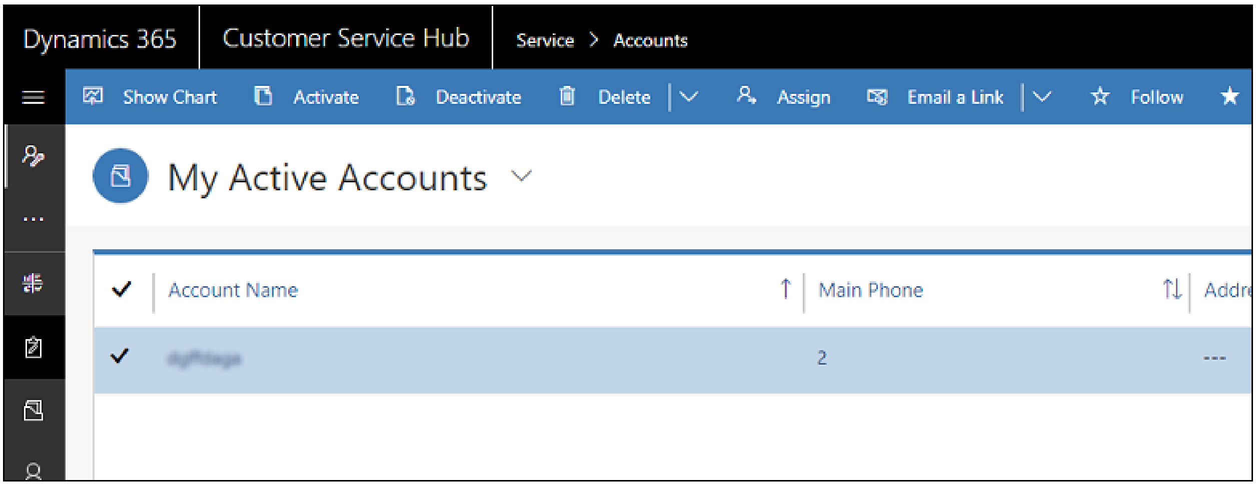

When you enable the hybrid experience, commands appear on the command bar. For example, when you select an account, **Edit**, **Merge**, and **Share** commands are available.




You can select **Share** to share this account with another user or team.




If you disable the hybrid experience, these commands are not available in the command bar.




**See also**

[Unified Interface]

# Onboard your organization and users

8/24/2018 • 21 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

New to Dynamics 365 (online)? We've put together step-by-step guidance whether you're still evaluating Dynamics 365 (online), ready to make a purchase, or ready to onboard your organization and users.

> **NOTE**
> This topic is targeted at administrators for Dynamics 365 (online). Many of the features covered in this topic are also available for Dynamics 365 (on-premises). If a feature is available only for Dynamics 365 (online), it's indicated in the topic. For more information about which features are online only, see Online-only features in Dynamics 365 Customer Engagement

## Step One: Try out Dynamics 365 (online) in a free 30-day trial

If you haven't already purchased Dynamics 365 (online), we recommend you start with a free 30-day trial. You can try out any of the Dynamics 365 apps, including Sales, Customer Service, Field Service, Project Service Automation, Operations, or Financials.

To get the most out of your free trial, watch this video: How to get the most out of your 30-day trial.

## Step Two: Buy and manage a subscription

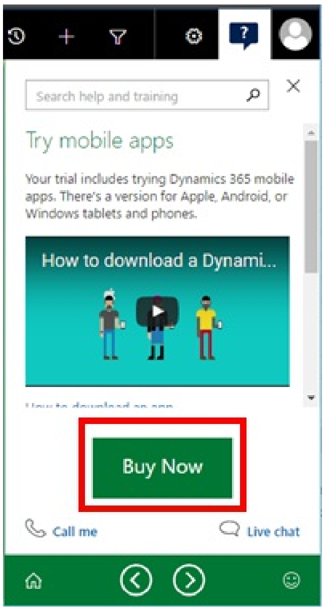
With Dynamics 365 (online), you can evolve your business on your terms. Start with just what you need to run your business. For example, you might want to start with the Dynamics 365 for Sales app or the Dynamics 365 for Customer Service app, and then add more apps as your needs change. More information: Dynamics 365

There are four ways to buy a subscription of Dynamics 365 (online):

- Convert from a trial
- Buy direct
- Buy through volume licensing
- Buy through a cloud solution provider

### Convert from a trial

The simplest way to buy Dynamics 365 (online) is to click the **Buy Now** button from one of the sidebars in the free 30-day trial:




> **NOTE**
> If your trial has expired, you'll receive an email that includes a **Buy Today** button.

When you convert from a trial, you keep any customizations you made during the trial period.

More information: Introduction to solutions

#### Buy direct

To buy direct, go to the Dynamics 365 pricing page. This page includes several different plans to fit your organization's needs.

#### Buy through volume licensing

If your organization has 250 or more Dynamics 365 users, you may be interested in purchasing a Dynamics 365 enterprise licensing agreement.

#### Buy through a cloud solution provider

A cloud solution provider can work closely with you to understand the needs of your business or organization. Learn how to find a Dynamics 365 partner.

#### Choose your support

Microsoft provides flexible, industry-leading support, services, and resources that enable users to quickly address technical issues and maximize return on your Dynamics 365 investment. Choose a plan that best meets your business requirements. More information: Dynamics 365 support

#### Set up points of contacts for communications

Microsoft regularly maintains and updates Dynamics 365 (online) to ensure security, performance, and availability, and to provide new features and functionality. From time to time, Microsoft also responds to service incidents. For each of these activities, the Dynamics 365 admin for your organization receives email notifications. You have control over who should receive these email communications.

More information:

- Policies and communications for Dynamics 365 (online)
- Manage email notifications

#### Manage subscriptions, licenses, and user accounts

As a Microsoft Online Services administrator, you manage the Dynamics 365 (online) subscription, including billing and payments, user licenses, accounts and registration. You do these tasks in the Office 365 admin center. More information: Manage subscriptions, licenses, and user accounts

### Add a Partner of Record to share account details with your partner

Many customers choose to work with a designated Microsoft partner to set up, customize, deploy, and administer their Dynamics 365 instance(s). If you have a partner assisting you, this process can be facilitated by selecting a designated Partner of Record (POR) inside the Office 365 Portal. This enables the sharing of select details, such as contact and user information with your POR. Sharing this information will allow your partner to more quickly access information about your account, create support requests on your behalf, and work with Microsoft to assist with your accounts. More information: Manage subscriptions, licenses, and user accounts

## Step Three: Plan your deployment and learn about FastTrack

Microsoft FastTrack for Dynamics 365 is our customer success service designed to help you move to Dynamics 365 smoothly and confidently, so you can realize business value faster. When you participate in the FastTrack program, you will receive guidance on best practices and how to plan for successful rollouts. You will also learn ways to enable new users and expand capabilities – all at your own pace. Additionally, you will have access to Microsoft engineering resources committed to make your experience with Dynamics 365 a success.

More information: Use the FastTrack customer success service to plan a successful Dynamics 365 rollout.

### Plan your deployment

Many decisions you make at the beginning and throughout the deployment process can have downstream effects and impact other phases of the plan. Developing a plan to deploy Dynamics 365 is important in determining the actions to take from inception to go live. The amount of resources involved in planning depends on the size and scope of the project. Large organizations may need a deployment team, while a small organization may assign these functions to a key person.

Often times an organization will employ an independent software vendor (ISV), value-added reseller, or partner to help implement and maintain a Dynamics 365 deployment. Partners bring experience, best practices, and industry expertise that will be valuable in the planning and deployment process. Find a partner if you don't have one.

More information:

- Get started administering Dynamics 365 (online)
- Plan for Dynamics 365 deployment and administration

## Step Four: Onboard your organization

After you purchase a subscription to Dynamics 365 (online), it's time to onboard your organization.

### Sign in to Dynamics 365 (online) and manage your subscription

- Sign in to Dynamics 365 and Office 365 apps
- Use the Office 365 admin center to manage your Dynamics 365 (online) subscription
- Optional: Manage user account synchronization

### Add users and assign security roles

Dynamics 365 uses role-based security. The security role assigned to a user determines the tasks the user is permitted to perform and the data the user is permitted to view. Every user must be assigned at least one security role to access Dynamics 365.

More information:

- Grant users access to Dynamics 365 (online) as a Microsoft Online service

- Create users and assign security roles

**Optional: Transfer customizations from your free 30-day trial**

If you made customizations to your free trial, you can transfer those customizations to your production instance.

More information:

- Export your customizations as a solution
- Use solutions for your customizations

For more advanced scenarios, consider the following development tools: Solution tools for team development.

**Manage storage**

You can manage your organization's data storage capacity in connection with your subscription to Dynamics 365 (online). The type of subscription you purchase determines the amount of storage initially allocated to your organization. If you run out of storage, you can add more.

More information:

- Manage storage for Dynamics 365 (online)

**Create a sandbox (non-production instance)**

You can create a sandbox instance (non-production environment) for development, testing, training, and other non-production uses. Then when you're ready to turn the sandbox instance into your production instance, you can switch it.

You get one free sandbox instance with your purchase of Dynamics 365 (online). You can also purchase additional sandbox instances.

More information:

- Manage Dynamics 365 (online) sandbox instances
- Switch an instance

**Set organization-wide system settings**

When you first set up Dynamics 365, you'll want to set system-wide settings.

More information:

- Find your way around Dynamics 365
- Set up a Dynamics 365 organization

**Import and export data**

Dynamics 365 provides an import tool for importing simple data stored in files. If the import tool doesn't satisfy your data import requirements, you may want to contact a partner. Find a partner if you don't have one.

More information:

- Import contacts
- Import accounts, leads, or other data
- Download a template for data import
- Best practices for migrating your data

Dynamics 365 (online) also provides advanced tools for exporting to Azure SQL Database. More information: Replicate data to Azure SQL Database using Data Export Service

**Set up Dynamics 365 for phones and Dynamics 365 for tablets**

The Dynamics 365 mobile apps make it easy to stay connected with your prospects and customers no matter where you are, or what mobile device you're using. Having access to Dynamics 365 data in the field also improves user adoption and productivity.

More information:

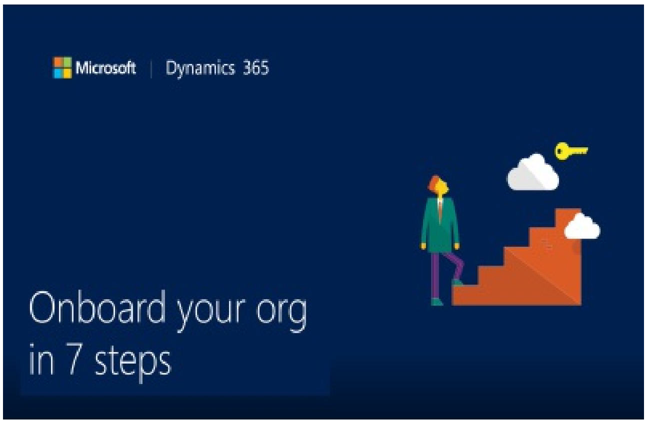
- Video: Overview of the mobile app
- Dynamics 365 for phones and tablets User's Guide
- Customize Dynamics 365 for phones and tablets to work for your business

# Onboarding cheat sheet for admins

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Here are the seven steps to getting your organization on board with Dynamics 365, and links to guides to help you complete each step. And if you haven't already seen it, check out the video for an overview of these seven steps to onboarding success.




## Step one: Add your people

- Manage subscriptions, licenses, and user accounts

## Step two: Set up email

- Integrate (synchronize) your email system

## Step three: Get mobile apps

- Dynamics 365 for phones and tablets User's Guide

## Step four: Customize your system

- Customization Guide

## Step five: Add SharePoint

- Set up SharePoint integration with Dynamics 365

## Step six: Skype!

- Skype for Business and Skype integration

## Step seven: Import your data

- Import contacts
- Import accounts, leads, or other data

**See also**

Get detailed information about onboarding your organization and users

# What are Preview features and how do I enable them?

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Preview features are features that aren't complete, but are made available on a "preview" basis so customers can get early access and provide feedback. Preview features:

- Are subject to separate Supplemental Terms of Use.
- **Are not supported by Microsoft Support**.
- May have limited or restricted functionality.
- Aren't meant for production use.
- May be available only in selected geographic areas.

## What preview features are included in Dynamics 365 (online), version 9.0.2

The following table lists preview features as well as learning resources for each.

| | |
|---|---|
| **Preview feature** | **Learning resource** |
| Relationship analytics | Preview feature: Relationship analytics |

## What preview features are included in Dynamics 365 (online), version 9.0?

The following table lists preview features as well as learning resources for each.

| | |
|---|---|
| **Preview feature** | **Learning resource** |
| Microsoft Cognitive Services integration | Preview feature: Microsoft Cognitive Services integration |

## What preview features are included in the December 2016 Update for Dynamics 365 (online)?

The following table lists preview features as well as learning resources for each.

| | |
|---|---|
| **Preview feature** | **Learning resource** |

| | |
|---|---|
| Relationship Insights | Preview feature: Relationship Insights |
| Document recommendations, product recommendations, knowledge article suggestions, case suggestions, and topic analysis | Preview feature: Microsoft Cognitive Services integration |

## What preview features were included in CRM Online 2016 Update 1?

The following table lists the features that are still in preview, as well as learning resources for each.

| | |
|---|---|
| **Preview feature** | **Learning resource** |
| Data Loader for bulk importing | Preview feature: Import bulk data |
| Get a quick overview of key Dynamics 365 (online) performance metrics | Preview feature: View metrics about your instance with Organization Insights dashboard |
| Track your Dynamics 365 deals and activities using Cortana | We are working to deliver a robust and scalable digital assistant experience across all of our Dynamics 365 offerings. This includes natural language integration for customers and partners across multiple channels including Cortana. To that end, we are discontinuing the current Cortana integration preview feature that was made available for Dynamics 365 and we are focusing on building a new long term intelligent solution experience, which will include Cortana digital assistant integration. |

**NOTE**

The Data Loader preview feature does not have to be enabled through the **Previews** tab.

## How do I enable a preview feature?

To enable a preview feature, you must be a Dynamics 365 administrator.

1. Go to **Settings** > **Administration**.
2. Choose **System Settings**, and then click the **Previews** tab.
3. Read the license terms, and if you agree, select the **I've read and agree to the license terms** check box.
4. For each preview feature you want to enable, click **Yes**.

## How do I report an issue or provide other feedback?

If you'd like to provide feedback, offer suggestions, or report issues for a preview feature, please go to Microsoft Dynamics Ideas. This website provides a collaboration platform for gathering actionable feedback to build and improve products and services.

# Quickly navigate with the Office 365 app launcher and the Dynamics 365 home page

10/29/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 (online) introduces a new app model for Dynamics 365 apps and makes accessing these and Office 365 apps fast and easy.

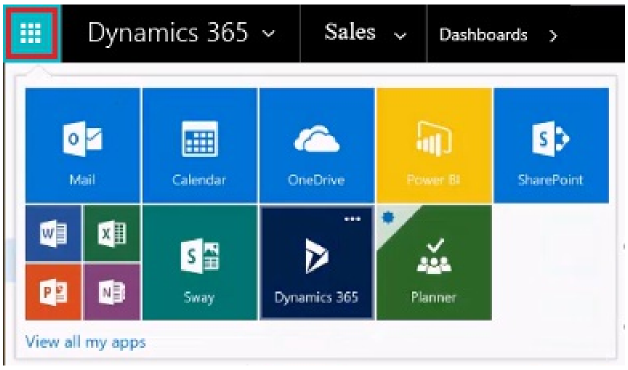
If you're a Dynamics 365 (online) user with an Office 365 subscription, you're just two clicks away from accessing the family of online apps that are available to you, like Word and Excel Online.

Watch a short video (3:35) about the Dynamics 365 business apps.

## For admins and end users: Quickly move between apps with the new Office 365 app launcher

The Office 365 app launcher is built in to all Dynamics and Office 365 apps. Use the app launcher to quickly navigate to your Dynamics application of choice.

If you have an Office 365 subscription, click the app launcher to go to the Office 365 apps and services available to you.

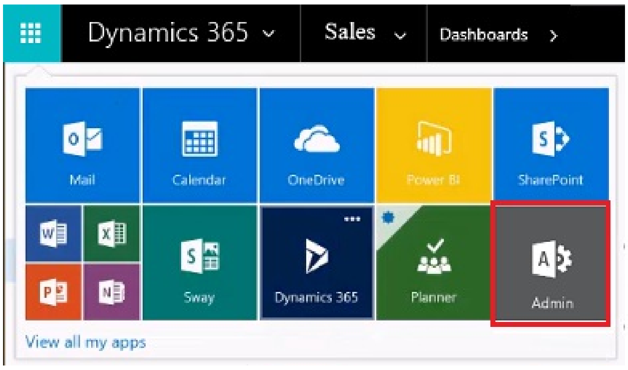



Check your email. Create a Word doc. Get files from your OneDrive. All while staying just two clicks away from getting back to Dynamics 365 (online).

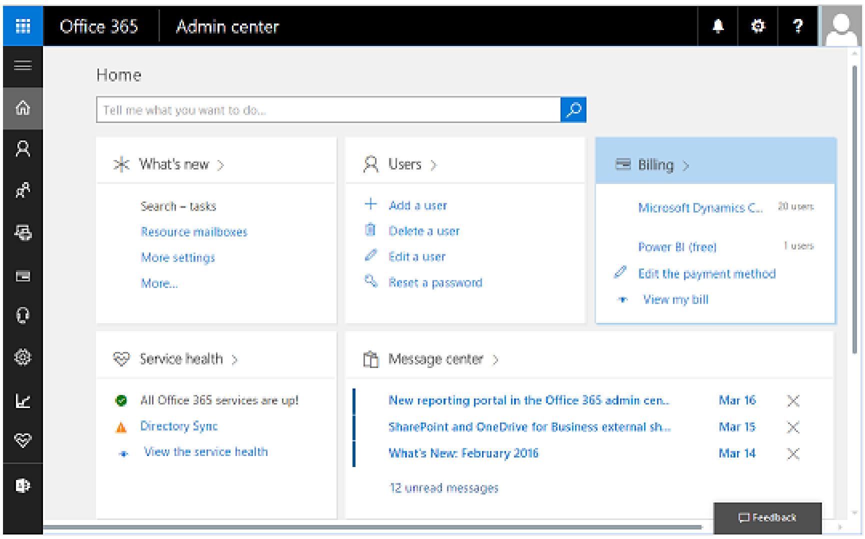
> **NOTE**
>
> **TIP**: If you've just started a trial or upgraded to Dynamics 365, you might need to refresh or open a new browser session to see your apps. There might be a delay for your instance to fully provision.
>
> For Microsoft Dynamics 365 Government subscriptions, the Office 365 app launcher will take users to either Dynamics 365 (online) or the Dynamics 365 admin center. Admins will go to the Dynamics 365 admin center.

## For admins: Get to the admin center through the Office 365 app launcher

If you're a Dynamics 365 system administrator or an Office 365 global administrator, click the app launcher to see the **Admin** tile.

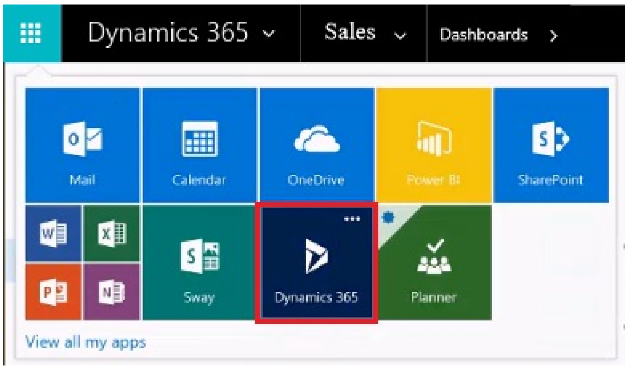



Click the **Admin** tile to go to the Office 365 Admin Center, where you can add users and change passwords.

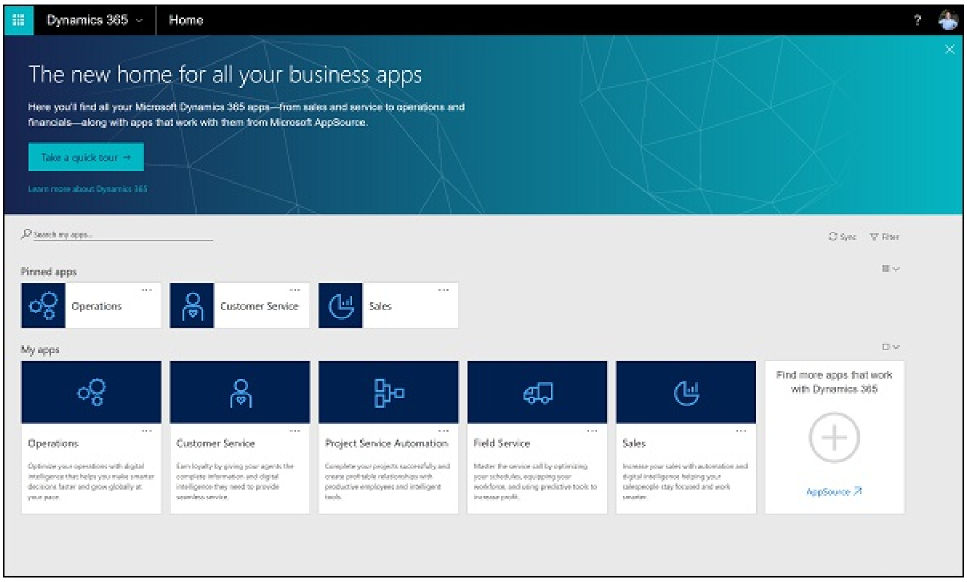



# For admins and end users: Introducing the Dynamics 365 home page

If you've transitioned to December 2016 Update for Dynamics 365 (online), we have a new page for you to manage and open Dynamics 365 apps. Click **Dynamics 365**from the app launcher, to go to the Dynamics 365 home page (home.dynamics.com).




The new Dynamics 365 home page.




**NOTE**

The Dynamics 365 home page is not part of the Microsoft Dynamics 365 Government subscription. Clicking Dynamics 365 takes Microsoft Dynamics 365 Government users to your instance of Dynamics 365 (online) or to the Dynamics 365 admin center.

See the next section to see what you can do with the home page.

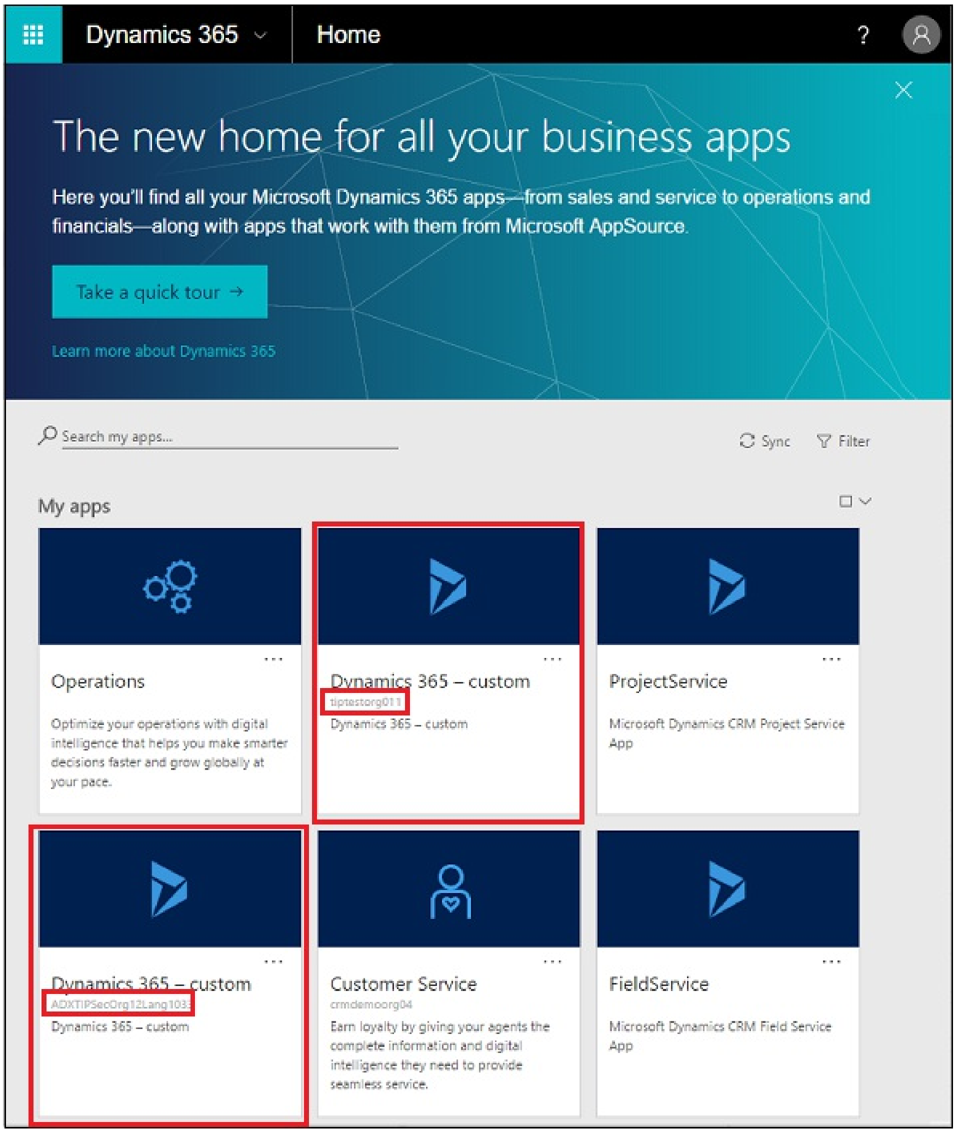
### View your apps

Any Dynamics 365 app for which you have a license appears as an app module tile on this page. If you have multiple instances of an app, select the tile for the instance you want to open.

In this example, there are two instances of Dynamics 365 (online) displayed.

**TIP**

If you've just started a trial or upgraded to Dynamics 365, you might need to refresh or open a new browser session to see your apps. There might be a delay for your instance to fully provision.




**NOTE**

**What is "Dynamics 365 - custom"?**

"Dynamics 365 - custom" is the app name for all online organizations with a version 8.1 and lower as well as the default app on 8.2. The name for the 8.2 default app can be changed by the administrator.

**What are the tiles on the home page?**

Dynamics 365 is introducing a new app model and what you're seeing are Dynamics 365 (online) apps for which you're licensed once you've upgraded to December 2016 Update for Dynamics 365 (online).

**Admins: You have options for displaying and naming Dynamics 365 - custom.**

Once you update to December 2016 Update for Dynamics 365 (online), you have options. Go to **Settings** > **Administration** > **System Setting** > **General** tab. Scroll down to **Set options for the default app: Dynamics 365 - custom**.

**Where do I get more information about upgrading to Dynamics 365?**

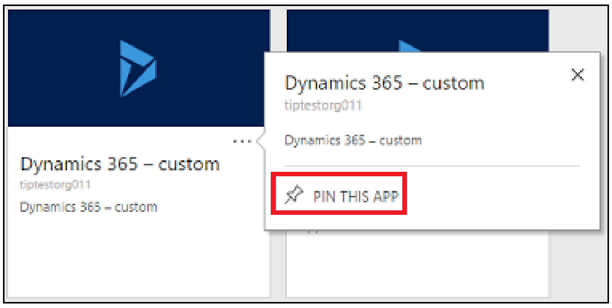
- Important information for CRM Online customers
- Switch from Dynamics CRM Online to Dynamics 365 (online)

### Pin your frequently-used apps

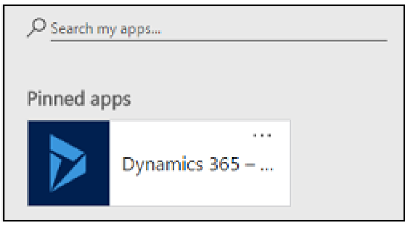
For companies with lots of Dynamics 365 apps, you can do a variety of things to make the home page more manageable. For example, pin your frequently-used apps to the top of your page.

1. Select the app on the home page.

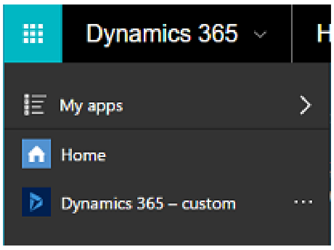
2. Click the **ellipses** (...), and then click **Pin this app**.




The app will appear at the top of the home page and in the task pane.



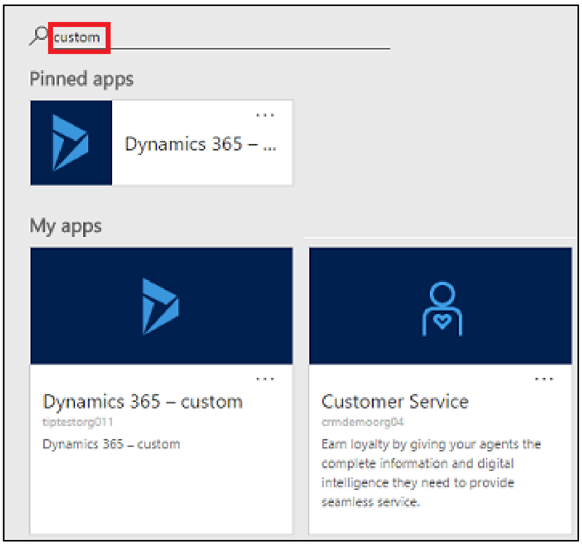

Pinned in the home page.




Pinned in the task pane.

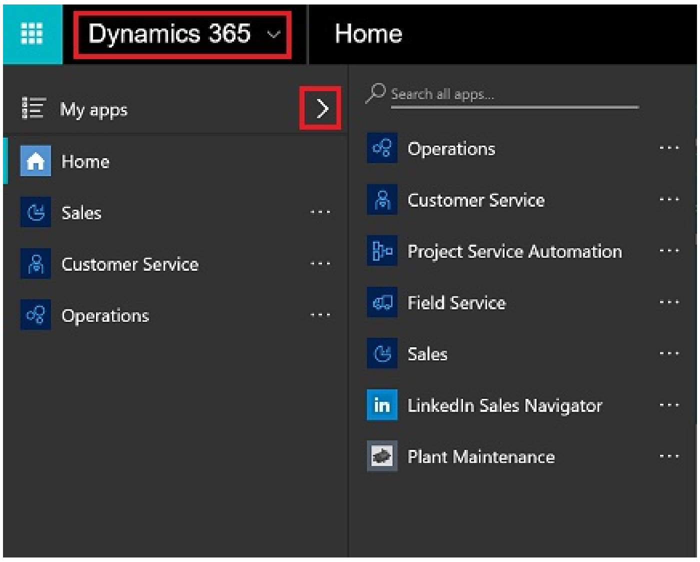
**Search your apps**

If you have a lot of apps, you can search for specific ones.




# For admins and end users: Select a Dynamics 365 app from the new app switcher

For customers who have upgraded to December 2016 Update for Dynamics 365 (online) or later, you can use the app switcher in Dynamics 365 (online) to quickly select other Dynamics 365 apps for which you're licensed.




You can pin apps using the ellipses on this menu, which will pin to the menu and to the home page.

### See also

Blog: Meet the all new Dynamics 365 Home page
Sign in to Dynamics and Office 365 apps My Apps on Home.Dynamics.com
Important information for CRM Online customers
Switch from Dynamics CRM Online to Dynamics 365 (online)
Meet the Office 365 app launcher

# Sign in to Customer Engagement and Office 365 apps

8/24/2018 • 3 minutes to read • Edit Online

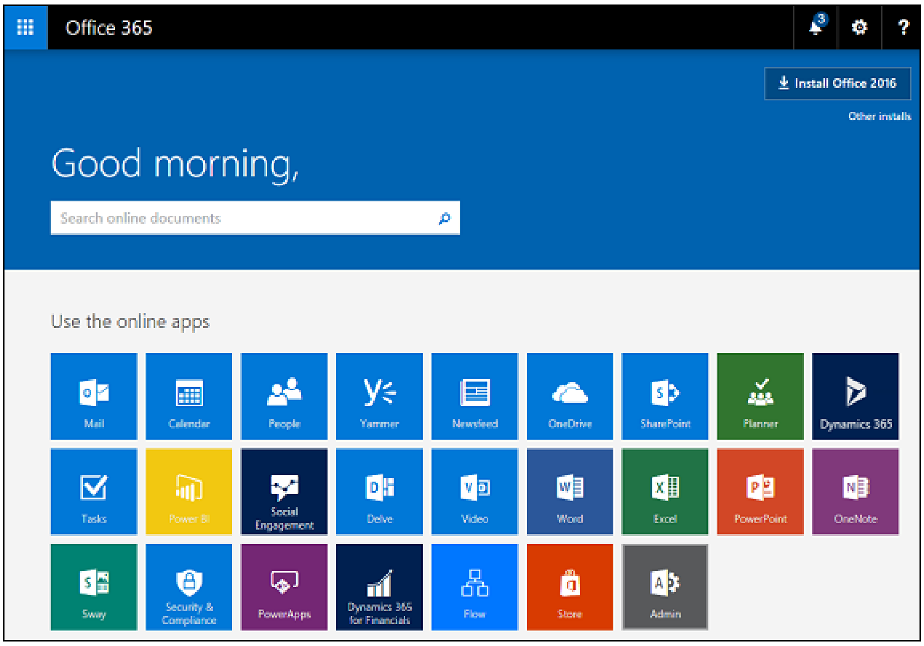
Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

There are multiple ways to sign in and access your Dynamics and Office 365 apps. You can sign in by using the Office 365 Admin Center, or sign in directly. For December 2016 Update for Dynamics 365 (online), we're introducing the Office 365 home page which you can also sign in to directly.

> **TIP**
>
> Admins: Be sure to share this information with your end users.
>
> You can troubleshoot issues with signing in to Dynamics 365 using the Support and Recovery Assistant for Office 365. For more information, see the blog New diagnostic scenario for web sign-in.

## Signing in to https://portal.office.com

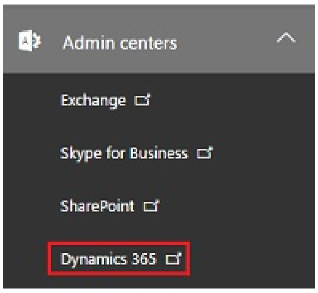
For admins and end users, when you sign in to https://portal.office.com, you will go to the Office 365 Welcome page. The tiles that appear on the Welcome page depend on what licenses you have. For example, if you have licenses for Office 365 and Dynamics 365 (online), you'll see tiles for Microsoft Office apps like Word, OneDrive, and SharePoint, as well as a tile for Dynamics 365.




Click the Dynamics 365 tile to go to the Dynamics 365 Home page. See For admins and end users: Introducing the Dynamics 365 home page.

If you're a Dynamics 365 system administrator, you'll see an**Admin** tile. Click this tile to get to the Office 365 Admin Center, where you can see your service health, manage users, manage licenses, and more for all the online services associated with your account.


From there, you can get to the Dynamics 365 admin center. Click **Admin centers** > **Dynamics 365**.




For other ways to access Dynamics and Office 365 apps, see Quickly navigate with the Office 365 app launcher and the Dynamics 365 home page.

## Direct sign in to the Dynamics 365 Administration Center

Some Dynamics 365 admin or Office 365 admin roles might be unable to access the Dynamics 365 admin center after signing in to https://portal.office.com. Use the following steps to directly navigate to the Dynamics 365 admin center and manage your Dynamics 365 (online) instance.

1. Go to https://port.<region>.dynamics.com/G/instances/InstancePicker.aspx

   Replace <region> with the region identifier or use one of the links below.

| REGION IDENTIFIER | URL |
|---|---|
| **crm** for North America (NAM) | https://port.crm.dynamics.com/G/instances/InstancePicker.aspx |
| **crm2** for South America (LATAM/SAM) | https://port.crm2.dynamics.com/G/instances/InstancePicker.aspx |
| **crm3** for Canada (CAN) | https://port.crm3.dynamics.com/G/instances/InstancePicker.aspx |
| **crm4** for Europe, Middle East, Africa (EMEA) | https://port.crm4.dynamics.com/G/instances/InstancePicker.aspx |
| **crm5** for Asia Pacific (APAC) | https://port.crm5.dynamics.com/G/instances/InstancePicker.aspx |
| **crm6** for Oceania (OCE) | https://port.crm6.dynamics.com/G/instances/InstancePicker.aspx |
| **crm7** for Japan (JPN) | https://port.crm7.dynamics.com/G/instances/InstancePicker.aspx |
| **crm8** for India (IND) | https://port.crm8.dynamics.com/G/instances/InstancePicker.aspx |
| **crm11** for United Kingdom (UK) | https://port.crm11.dynamics.com/G/instances/InstancePicker.aspx |

For Germany (DEU), use the following:
https://port.crm.microsoftdynamics.de/g/instances.instancepicker.aspx.

2. Sign in with your Dynamics 365 (online) admin credentials.

## Direct sign in to the Dynamics 365 home page

We have a new Dynamics 365 home page for you to use to manage and open Dynamics 365 apps. You can sign in to this page directly using your Office 365 (or Active Directory) credentials with this URL:
https://home.dynamics.com

For information on the Dynamics 365 home page, see: For admins and end users: Introducing the Dynamics 365 home page.

## Direct sign in to Dynamics 365 (online)

To directly sign in to the Dynamics 365 (online) service, use:

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

> **NOTE**
>
> For other regions, replace .crm with:
>
> - .crm2 for South America (LATAM/SAM)
> - .crm3 for Canada (CAN)
> - .crm4 for Europe, Middle East, Africa (EMEA)
> - .crm5 for Asia Pacific (APAC)
> - .crm6 for Oceania (OCE)
> - .crm7 for Japan (JPN)
> - .crm8 for India (IND)
> - .crm9 for United States of America Government
> - .crm11 for United Kingdom (UK)

For Germany (DEU), use the following: https://<organization>.crm.microsoftdynamics.de.

Your user name 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).

Dynamics 365 administrators can provide the URL and sign-in information.

## Direct sign in to Social Engagement

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

https://listening.microsoft.com/app/

This URL, which includes the appID, is sent to the Dynamics 365 administrator in an email invitation.

Your user name 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).

Dynamics 365 administrators can provide the URL and sign-in information.

**See also**

Quickly navigate with the Office 365 app launcher and the Dynamics 365 home page
Important information for CRM Online customers

Switch from Dynamics CRM Online to Dynamics 365 (online)
Troubleshoot sign-in problems

# Troubleshoot sign-in problems

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

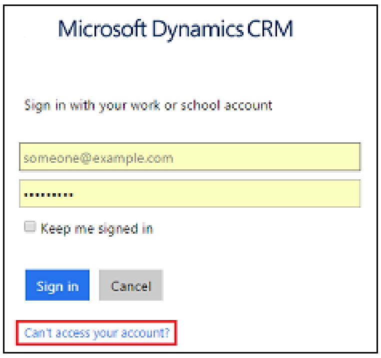
Having trouble signing in to Dynamics 365 (online) or another Dynamics 365 (online) service, such as Microsoft Social Engagement? Here's what you need to know about passwords, signing in, and common error messages.

> **IMPORTANT**
> If you're an administrator, make sure to check the Service Health Dashboard for maintenance issues.

## Password issues

### If you're an administrator

If you forget your administrator password, you can reset it by going to the sign-in page, and choosing **Can't access your account?** at the bottom of the page.




> **TIP**
> 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

To reset user passwords, you use the Office 365 Admin Center. More information: Reset a user's password

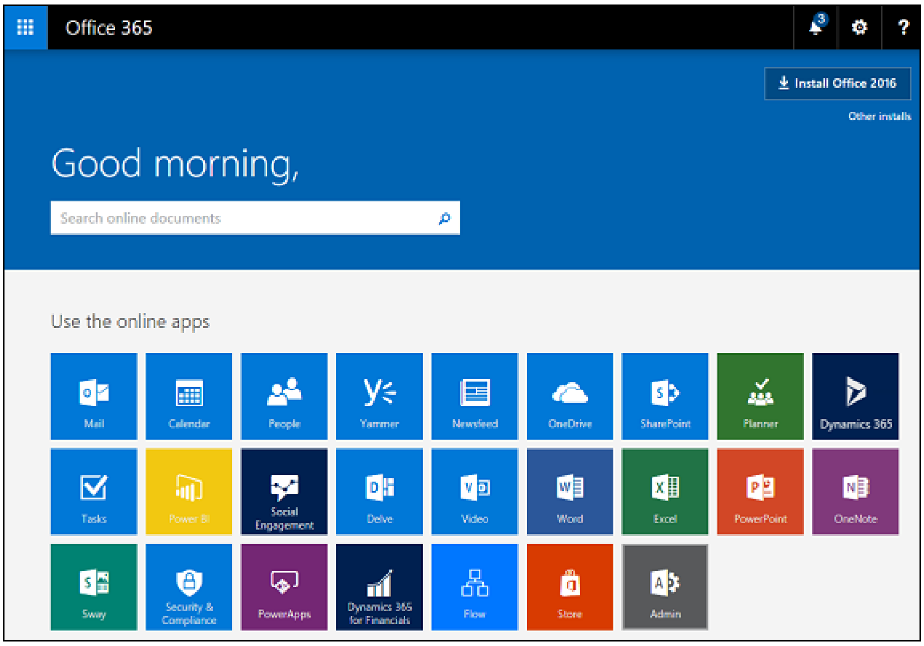
### If you're not an administrator

If you're not an administrator, and you forgot your password, you'll need to contact your administrator and ask for a password reset. Once your administrator resets your password, you'll receive an email with instructions on how to sign in and enter a new password. More information: Find your Dynamics 365 administrator or support person

## Signing in

### For admins and end users: Sign in at https://portal.office.com

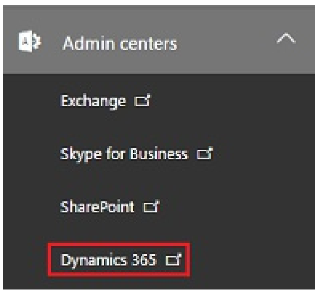
For admins and end users, when you sign in to https://portal.office.com, you will go to the Office 365 Welcome page. The tiles that appear on the Welcome page depend on what licenses you have. For example, if you have licenses for Office 365 and Dynamics 365 (online), you'll see tiles for Microsoft Office apps like Word, OneDrive, and SharePoint, as well as a tile for Dynamics 365.




Click the Dynamics 365 tile to go to the Dynamics 365 Home page. See For admins and end users: Select a Dynamics 365 app from the new app switcher.

If you're a Dynamics 365 system administrator, you'll see an**Admin** tile. Click this tile to get to the Office 365 Admin Center, where you can see your service health, manage users, manage licenses, and more for all the online services associated with your account.


From there, you can get to the Dynamics 365 admin center. Click **Admin centers** > **Dynamics 365**.




For other ways to access Dynamics and Office 365 apps, see Quickly navigate with the Office 365 app launcher and the Dynamics 365 home page.

### For admins and end users: Sign in to the Dynamics 365 home page

We have a new Dynamics 365 home page for you to use to manage and open Dynamics 365 apps. You can sign in to this page directly using your Office 365 (or Active Directory) credentials with this URL: https://home.dynamics.com

For information on the Dynamics 365 home page, see: For admins and end users: Introducing the Dynamics 365 home page.

### If you’re an end user

You can sign in directly to Dynamics 365 (online) or Microsoft Social Engagement. You can also sign in at https:/portal.office.com.

#### Sign in directly to Dynamics 365 (online)

Your Dynamics 365 administrator provides the direct Dynamics 365 (online) URL in an email invitation. This URL will be in the following format: https://<yourorganization>.crm.dynamics.com. For example, enter https://contoso.crm.dynamics.com. If you can't find the email that contains the URL, contact your Dynamics 365 administrator. More information: Find your Dynamics 365 administrator or support person

> **NOTE**
>
> If you're in a region other than North America, substitute "*crm*" in the URL with:
>
> - .crm2 for South America (LATAM/SAM)
> - .crm3 for Canada (CAN)
> - .crm4 for Europe, Middle East, Africa (EMEA)
> - .crm5 for Asia Pacific (APAC)
> - .crm6 for Oceania (OCE)
> - .crm7 for Japan (JPN)
> - .crm8 for India (IND)
> - .crm9 for United States of America Government

After entering your URL, you'll be prompted for your user name. Your user name will be in one of the following formats:

- username@contoso.onmicrosoft.com (standard Office 365 domain)
- username@contoso.com (custom domain)

**What if I'm still using a Microsoft account to sign in to Dynamics 365 (online)?**

Use the email address provided by your Dynamics 365 administrator (sent in an email invitation). Verify that you're using the same Microsoft account email address that the email invitation was sent to. Note that you can't sign in to Microsoft Social Engagement with a Microsoft account. Troubleshoot problems with your Microsoft account user name or password.

#### Sign in directly to Microsoft Social Engagement

Your administrator provides the direct URL for Microsoft Social Engagement in an email invitation. This URL will be in the following format: https://listening.microsoft.com/app//. If you can't find the URL, contact your administrator.

After entering your URL, you'll be prompted for your user name. Your user name will be in one of the following formats:

- username@contoso.onmicrosoft.com (standard Office 365 domain)
- username@contoso.com (custom domain)

## Common error messages

**I receive this license error: "The selected user or the user trying to log on has not been assigned a security role, and does not have sufficient privileges for this action"**

This error must be fixed by someone that has permissions to add security roles to users in Dynamics 365, such as your system administrator. To learn how to add security roles, see Security roles and privileges.

**When I try to sign in, Internet Explorer continues to redirect to another web page and gets into a loop until I choose the Internet Explorer window.**

To avoid this error, add the URLs used for Dynamics 365 to trusted sites in Internet Explorer:

1. In Internet Explorer, on the **Tools** menu, select **Internet Options**.
2. On the **Security** tab, in the **Select a zone to view or change security settings** section, click or tap

**Trusted sites**.

3. Click or tap **Sites**.

4. In the **Trusted sites** dialog box, type the following URLs in the **Add this website to the zone** text box:

   - http://*.dynamics.com

   - http://*.live.com

   After you add each URL, click or tap the **Add** button.

5. If you receive a dialog box that states **Sites added to this zone must use the https:// prefix**, clear the **Require server verification (https:) for all sites in this zone** check box.

6. Click or tap **Close**, and then click or tap **OK**.

**Why do I have to sign in again? Can I change the amount of time I'm signed in?**

Dynamics 365 keeps you signed in for 8 hours. When you've been signed in for 7 hours and 40 minutes, a message will appear warning that your session is about to expire, and you then have 20 minutes to respond. Click or tap **OK**, sign in again, and then click the back button on your browser to return to the area of Dynamics 365 in which you were working. You can’t change the amount of time you’re signed in.

### See also

Sign in to Dynamics and Office 365 apps
Contact technical support

# What is Office 365 and how does it relate to Dynamics 365 (online)?

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

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. Dynamics 365 (online) takes advantage of the Office 365 administration features to simplify user management. Dynamics 365 (online) users are created and managed in the Office 365 admin center.

A Dynamics 365 (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 Dynamics 365 (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 Dynamics 365 (online) integration.

## Terminology

| TERM | DEFINITION |
| --- | --- |
| Tenant | For Dynamics 365 (online), a tenant is the account you create in the Microsoft Online Services environment when you sign up for a Dynamics 365 (online) subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple Dynamics 365 (online) instances.<br><br>The tenant created for you has a domain name of <account>.onmicrosoft.com. For example, contoso.onmicrosoft.com. |
| Instance | When you sign up for a trial or purchase a Dynamics 365 (online) subscription, a Dynamics 365 (online) production instance is created. Each additional production or non-production (Sandbox) Dynamics 365 (online) instance you add creates a separate and isolated Dynamics 365 organization on the same tenant.<br><br>An instance has the URL format: https://<URL name>.crm.dynamics.com. For example, https://contososales.crm.dynamics.com. |

| TERM | DEFINITION |
| --- | --- |
| Subscription | A subscription consists of the Dynamics 365 licenses and add-ons included with the trial or paid service you signed up for in your Dynamics 365 (online) account. Dynamics 365 subscriptions can vary in license type, price, and end date.<br><br>For example, a subscription might be 100 licenses of Dynamics 365 (online) Professional and 10 licenses of Dynamics 365 (online) Enterprise. |
| Identity | The user account used to sign in to Dynamics 365 (online). You can also use this identity to access other Microsoft Online services, such as Office 365 or SharePoint Online. Administrators can decide if they want to federate user identity management between Dynamics 365 (online) and on-premises Active Directory. |
| User account | A user account assigned by an organization (work, school, non-profit) to one of their constituents (an employee, student, customer) that provides sign-in access to one or more of the organization's Microsoft cloud service subscriptions, such as Exchange Online or Dynamics 365 (online). Access to an online service is controlled by the license assigned to the user account.<br><br>User accounts are stored in an organization's cloud directory within Azure Active Directory, and are typically deleted when the user leaves the organization. Organizational accounts differ from Microsoft accounts in that they are created and managed by admins in the organization, not by the user. |
| Security group | If your company has multiple Dynamics 365 (online) instances, you can use instance security groups to control which licensed users can access a particular instance. More information: Control user access to instances: security groups and licenses |

## 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 users need one?

8/24/2018 • 2 minutes to read • Edit Online

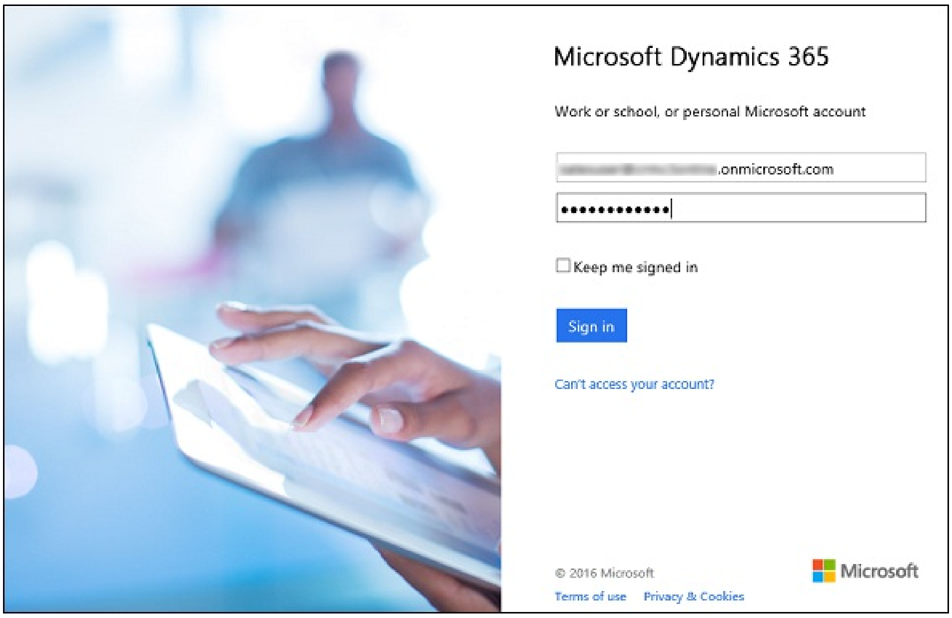
Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Each user signs in to Dynamics 365 (online) with an Office 365 user ID (more precisely, an Azure Active Directory user ID, see the Note later in this topic). Access to Dynamics 365 (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 Dynamics 365 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**
>
> Dynamics 365 (online) uses Azure Active Directory as its identity provider. You access Dynamics 365 (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?

Use the Office 365 admin center to manage your Dynamics 365 (online) subscription

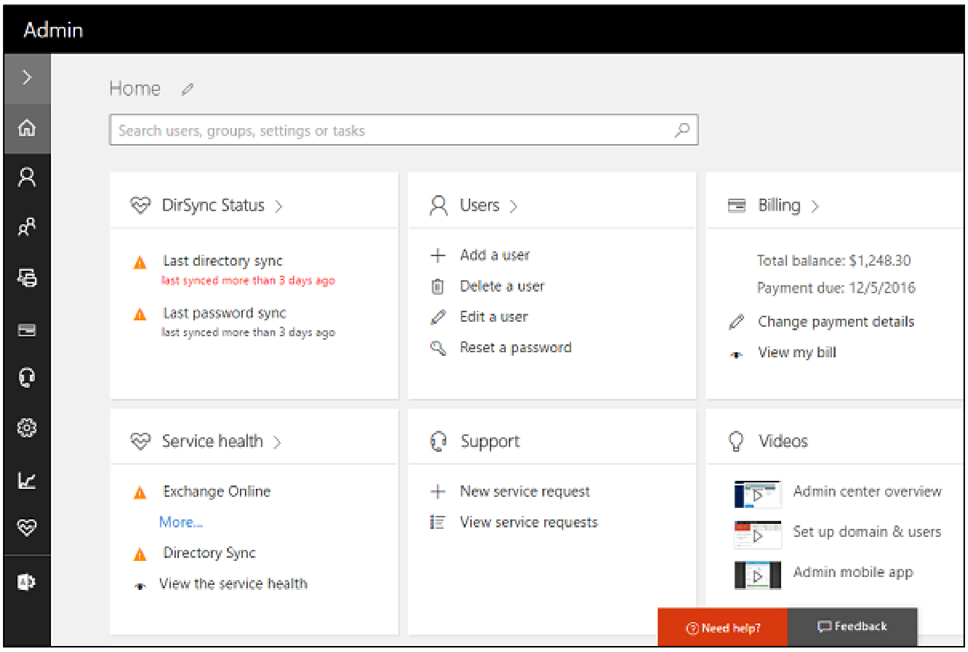
Create users and assign security roles

# Use the Office 365 admin center to manage your subscription

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

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

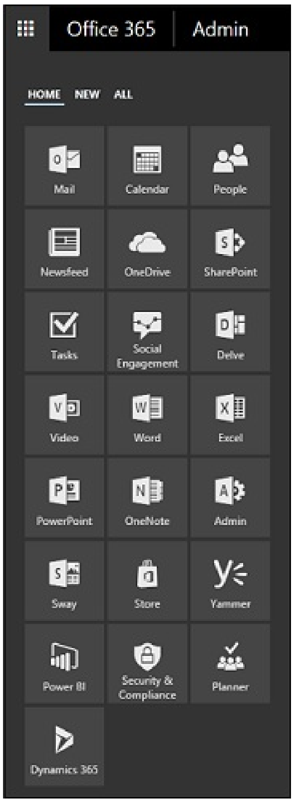



Review the information in this topic to learn how to do common Dynamics 365 (online) administrative tasks in the Office 365 Admin Center.

> **NOTE**
> You must have the Global admin role to fully access the Office 365 Admin Center.

## Open Dynamics 365 and other services with the app launcher

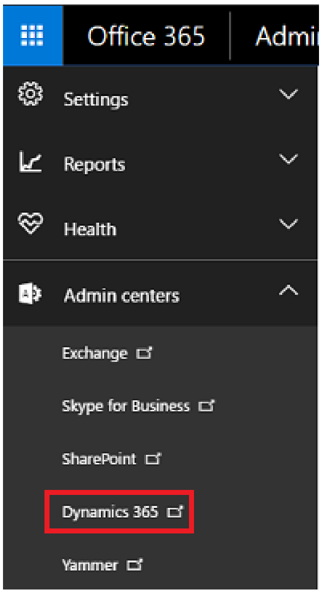
You can open Dynamics 365 (online) and other services such as Microsoft Social Engagement from the Office 365 app launcher. Choose **Admin** to open the Office 365 Admin Center and **Dynamics 365** to open Dynamics 365 (online). More information: Find help for the latest changes in Office 365



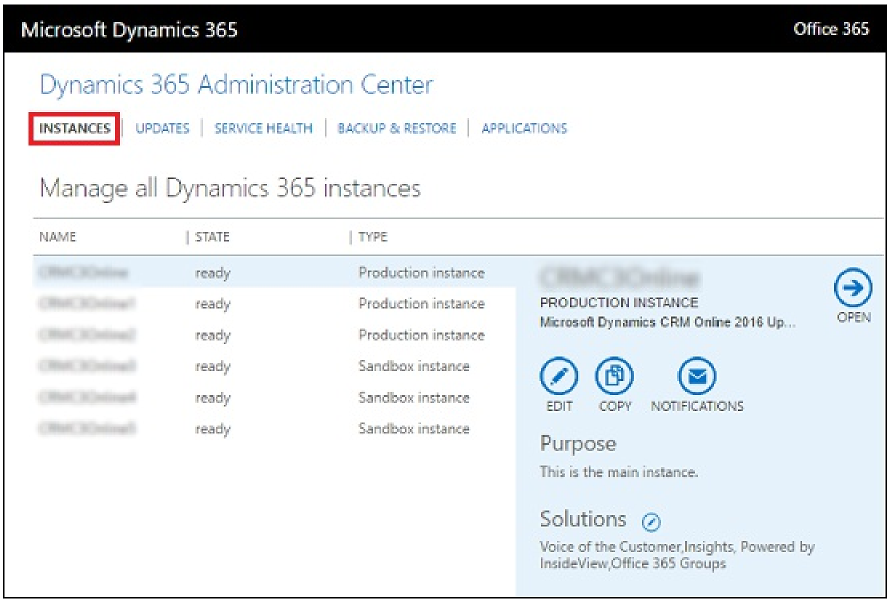

## Manage instances and updates in the Dynamics 365 Administration Center

The Dynamics 365 admin center is your portal site to manage Dynamics 365 (online) instances and updates.

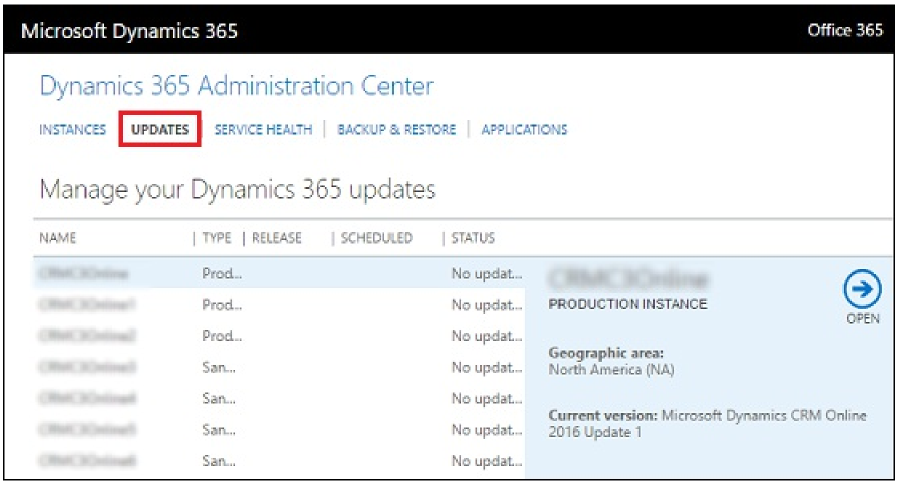
You access the portal by choosing Dynamics 365 from the left-side menu in the Office 365 Admin Center.




Choose the **Instances** tab to edit, copy, and reset, existing instances, configure new instances, manage preferred solutions, and more. More information: [Manage Dynamics 365 (online) instances]




Choose the **Updates** tab to approve and schedule updates, change the update target version, and open Dynamics 365 (online). More information: Manage Dynamics 365 (online) updates




# Check your service health

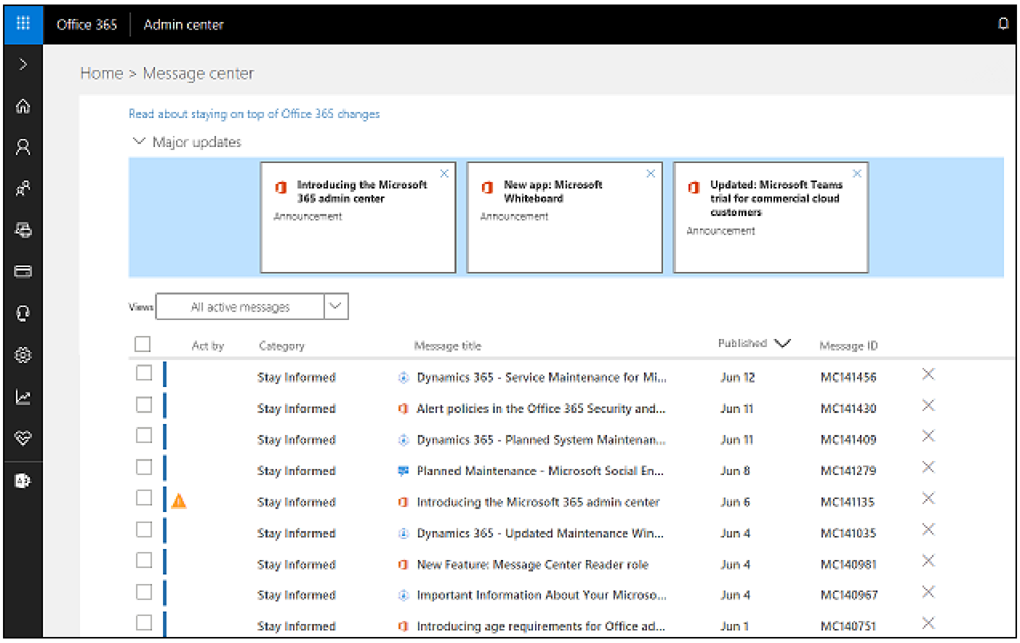
You can quickly get real-time status of your Dynamics 365 (online) and Office 365 services. The Service health page on the Office 365 Admin Center provides a comprehensive view of the service health of your online services. If users are having trouble signing in to Dynamics 365 (online), check this page to see if there is a service outage.

For more information, see How do I check my online service health?

# 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.

Click **Health** > **Message center**, and select messages to get more information.




## Request support

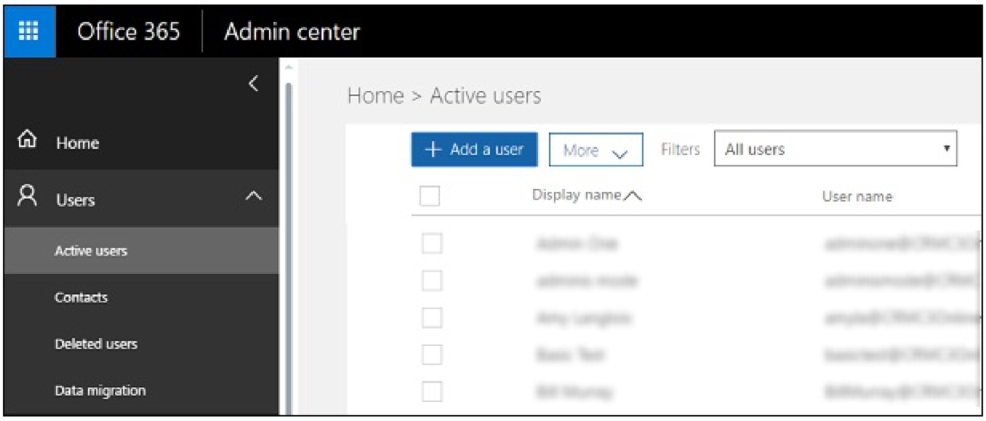
Having a problem with your Dynamics 365 (online) service? You can create a support request to get the issue resolved.

More information: Contact Technical Support

## Manage users

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

You use the Office 365 Admin Center to add, edit, and delete Dynamics 365 (online) users and to reset passwords.

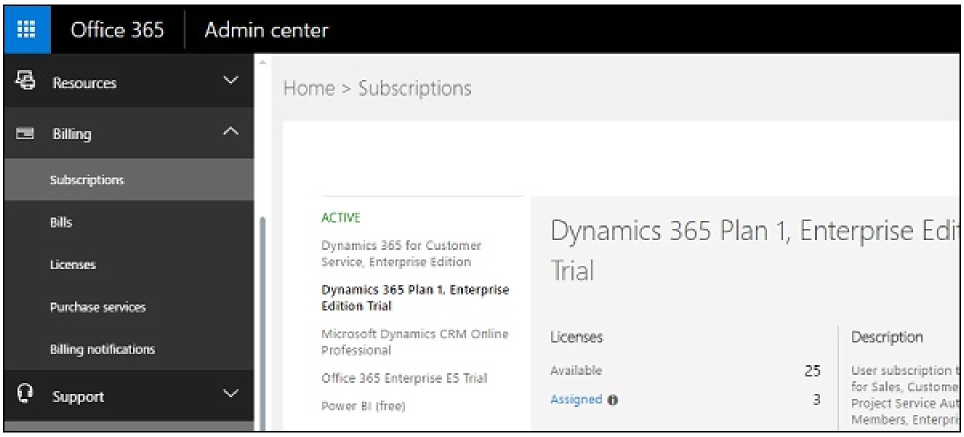



> **NOTE**
>
> Dynamics 365 (online) uses Azure Active Directory as its identity provider. You access Dynamics 365 (online) through an Azure Active Directory user ID that is created and managed in the Office 365 Admin Center. For simplicity, we'll refer to the Azure Active Directory user ID as the Office 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

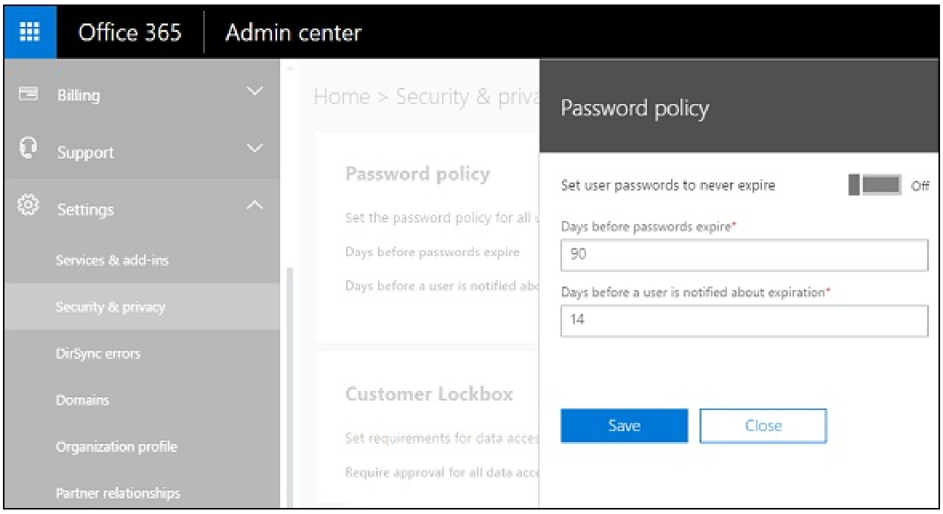
## Manage subscriptions

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




## Set the password expiration

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



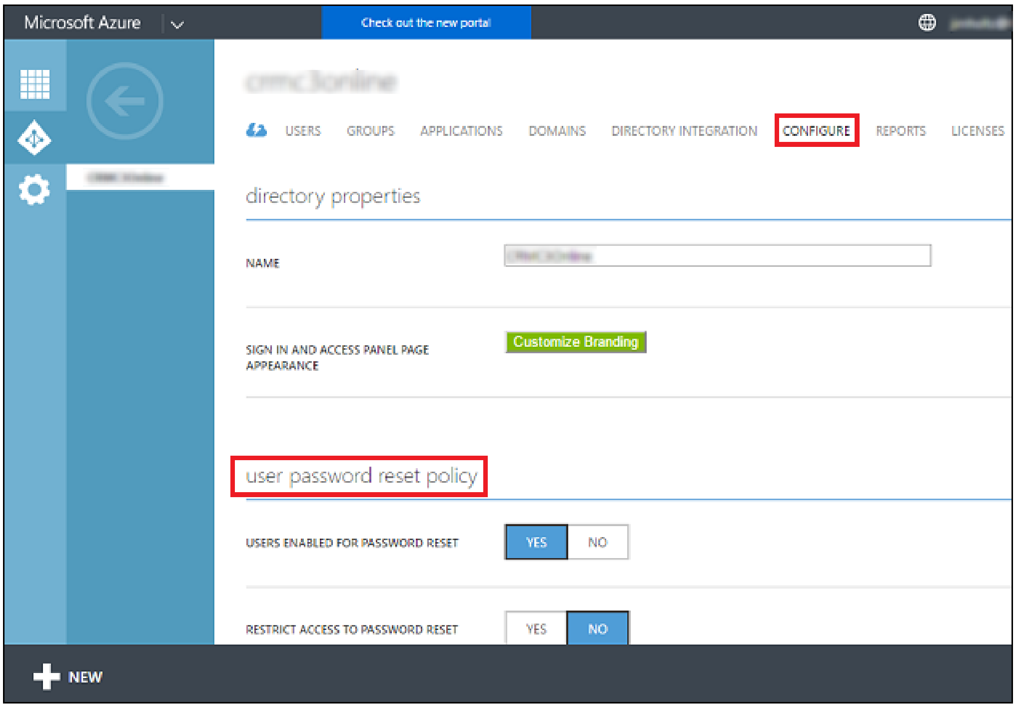

**TIP**

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 Azure

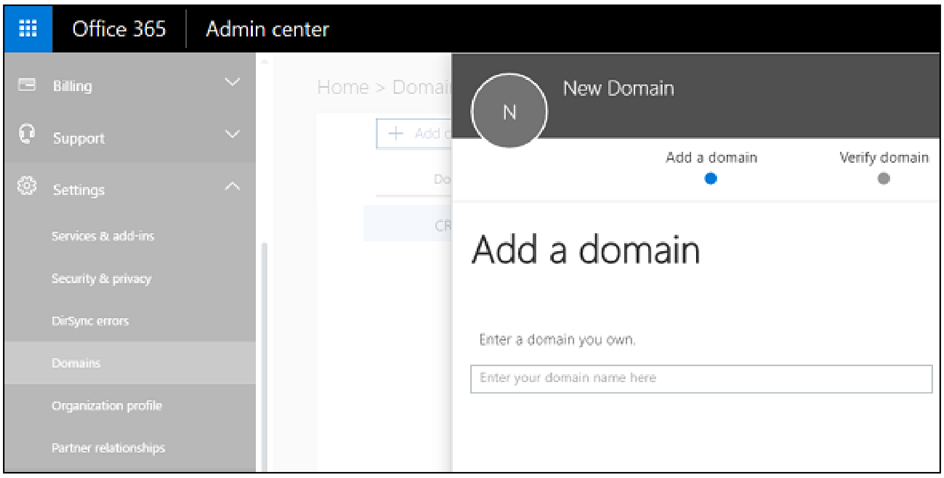
If you have an Azure Active Directory Basic or Premium subscription, you can set it up so users can do their own password reset. You can access Azure Active Directory configuration from the Office 365 Admin Center. More information: Enable users to reset their Azure AD passwords

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



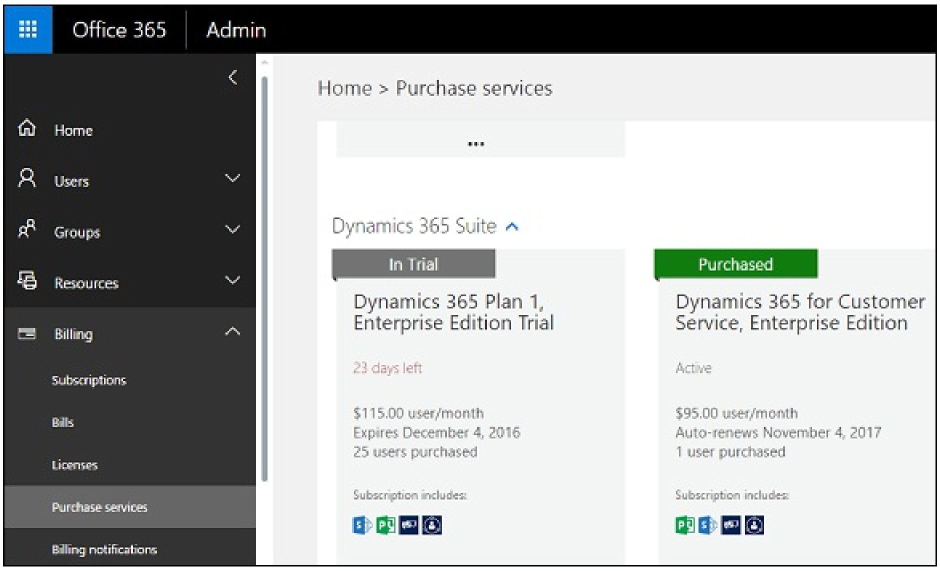

## Add your domain

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, click **Billing** > **Purchase services** to add licenses or purchase new online services.




## See also

[About the Office 365 admin center]()
[Set an individual user's password to never expire]()

# How do I check my online service health?

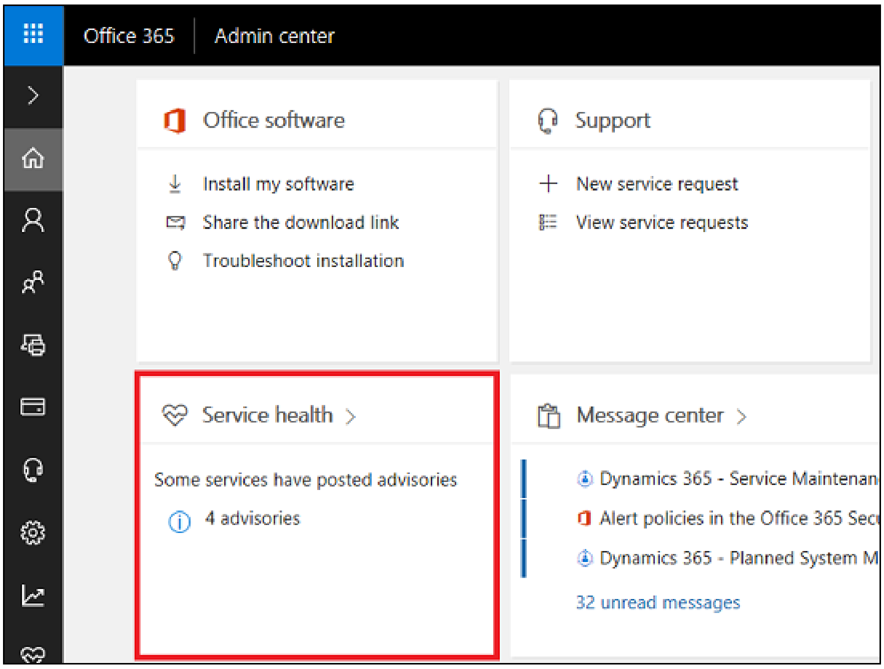
8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can quickly get a real-time status of your Dynamics 365 (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 Dynamics 365 (online), check this page to see if there is a service outage.

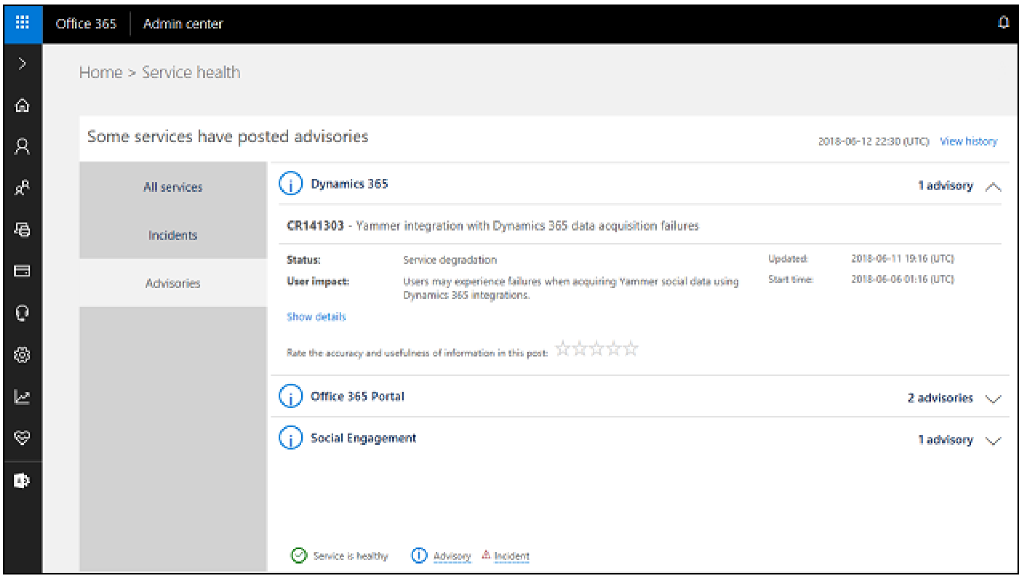
## View a snapshot of service health

Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can see a quick snapshot of service health for some of your Office 365 services. Select **Service health** (from the menu: **Health** > **Service health**) to get more information on all your services.



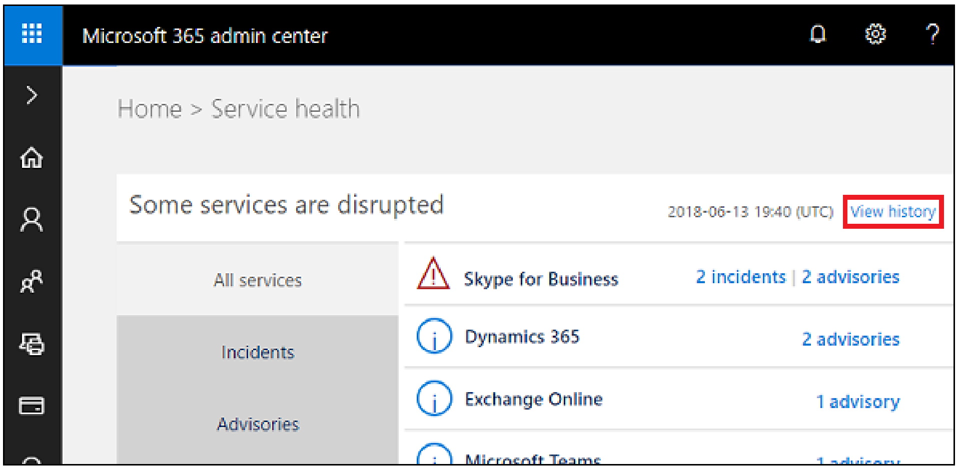

## View Dynamics 365 (online) service health

Select an Office 365 service, such as Dynamics 365 (online), to get detailed information on its service health status.

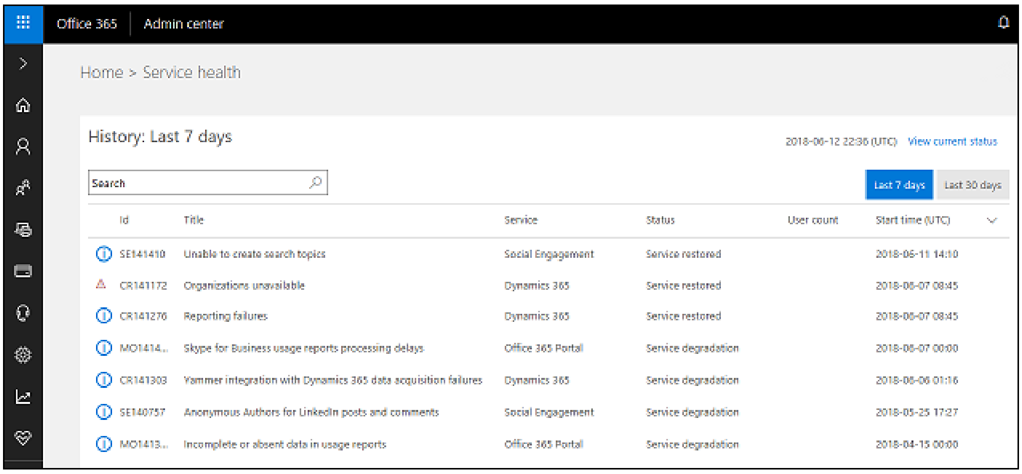



# View service health history

Select **View history** in the upper-right corner to view the past 7 or the past 30 days of service.

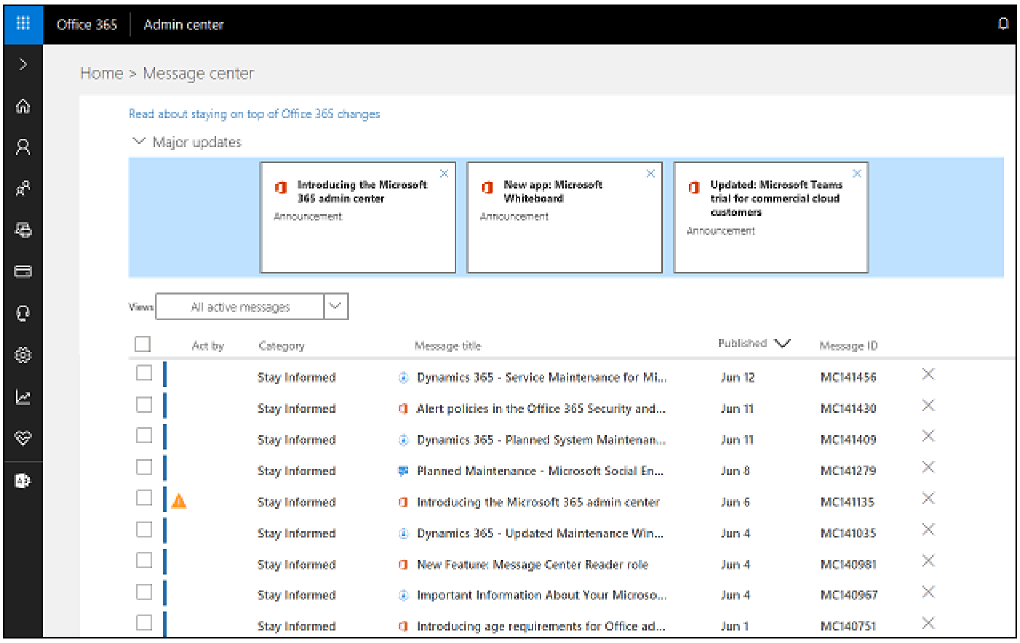



Select an item to see service health status and details for that item.




# View planned maintenance

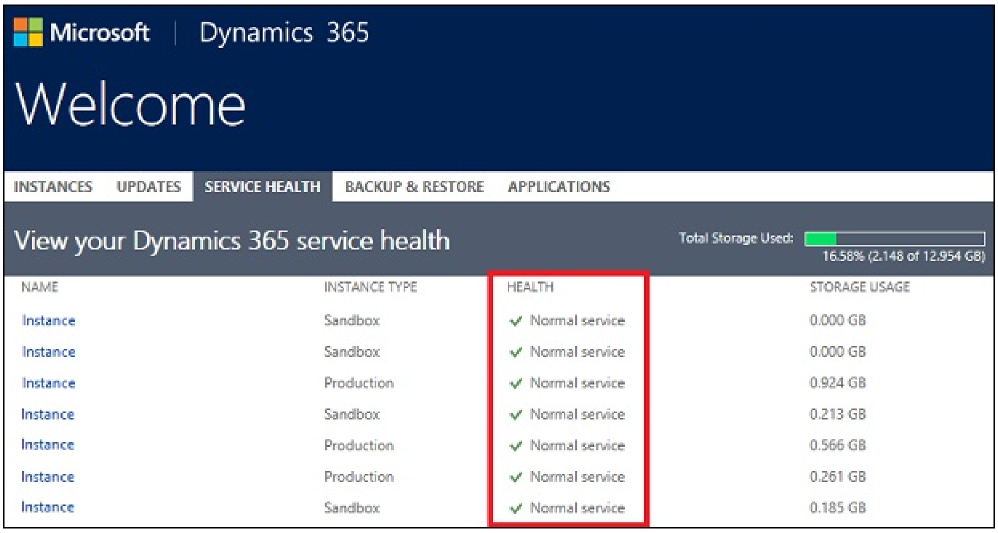
Select the **Message center** on your home dashboard (from the menu: **Health** > **Message center**) to see if there are any scheduled events for your online service and to view other informative messages.




## View instance service health

If your company has multiple instances of Dynamics 365 (online), you can see the health status for individual Dynamics 365 (online) instances in the Dynamics 365 admin center.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Select the **Service Health** tab.




### See also

Use the Organization Insights solution to view metrics about your instance
Preview feature: Use the Organization Insights dashboard to view metrics about your instance

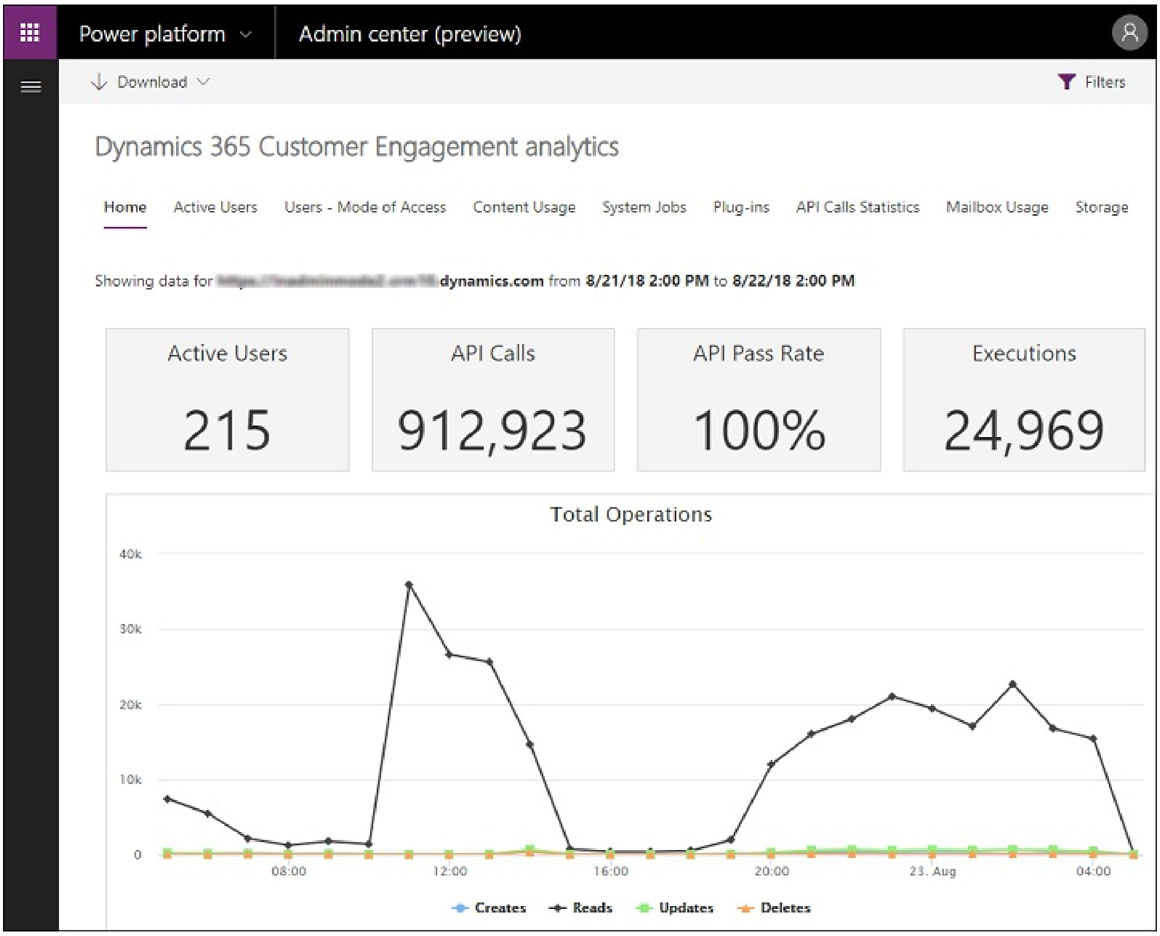
# Use the Organization Insights solution to view metrics about your instance

9/12/2018 • 21 minutes to read • Edit Online

**IMPORTANT**

We've improved how you view metrics for your organization. You no longer need to install or update a solution. Instead, you can view Customer Data Service for Apps analytics right from the Power platform Admin center to quickly view adoption ad user metrics for your organization.

For more information, see Common Data Service for Apps analytics



# Preview feature: Use the Organization Insights dashboard to view metrics about your instance

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the Organization Insights dashboard to get a quick view of key Dynamics 365 (online) metrics such as the number of active users and page requests.

**IMPORTANT**
The Organization Insights dashboard is a preview feature in Dynamics CRM Online 2016 Update 1. A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality. To use this feature, it must be turned on and the license terms must be accepted. What are Preview features and how do I enable them? Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

Consider using the new Organization Insights solution for a richer view of your instance metrics. Organization Insights dashboard will remain a preview feature and will be deprecated once the Organization Insights solution is fully available.

Note the following:

- In all charts, you can select a two hour (2H), forty-eight hour (48H) or thirty-day (30D) time period for data to be included in the chart. Data is refreshed as shown in the following table.

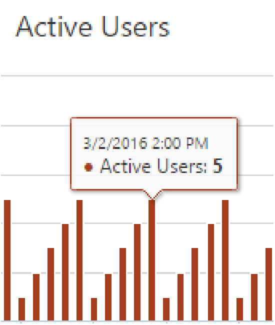
| LOOKBACK PERIOD | DATA AGGREGATION INTERVAL |
| --- | --- |
| 2H | 5 minutes |
| 48H | 1 hour |
| 30D | 1 day |

- Expect a data synchronization delay of approximately 45 minutes or more. For example, at 4:30 PM, a 2 hour (2H) lookback might show data in the chart for 1:45 PM to 3:45 PM.
- Aggregation intervals use the UTC time standard and not the user-defined time zone.
- If a chart has multiple elements such as Most Active Users, you can click the chart element to switch its display.

## View the Organization Insights dashboard

To view the Organization Insights dashboard, go to any dashboard, click **Select** (⌄) next to the dashboard title, and then click **Organization Insights Dashboard**. The following charts are provided.

## Active users



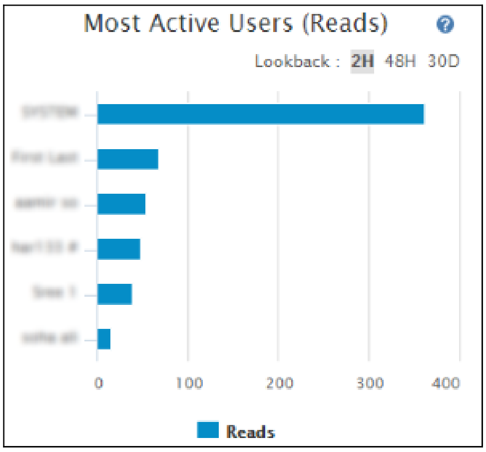

### What's included in this chart

| CHART ELEMENT | DESCRIPTION |
| --- | --- |
| Active Users | Total number of active users (unique users) who performed an operation that caused one of these SDK calls: `Retrieve`, `Retrieve Multiple`, `Delete`, `Create`, and `Update`. |

### How to interpret this chart

This chart shows the adoption and usage of your Dynamics 365 instance based on active users (unique users) with read, write, create, and update actions.

# Most Active Users (Reads)



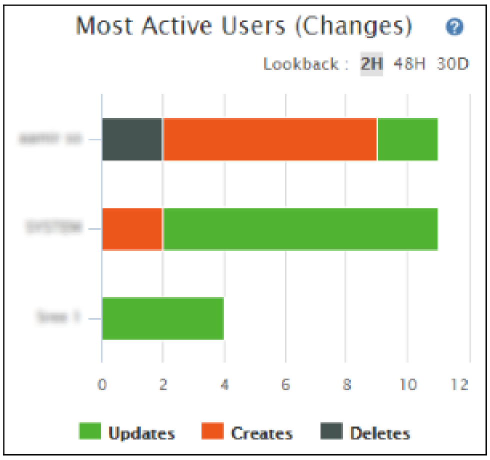

### What's included in this chart

| CHART ELEMENT | DESCRIPTION |
| --- | --- |
| Reads | List of most active users who performed an operation that caused a `Retrieve` or `Retrieve Multiple` SDK call in your Dynamics 365 instance over the selected time period. |

### How to interpret this chart

This chart lists the top ten users who performed the most `Read` operations in your Dynamics 365 instance.

# Most Active Users (Changes)



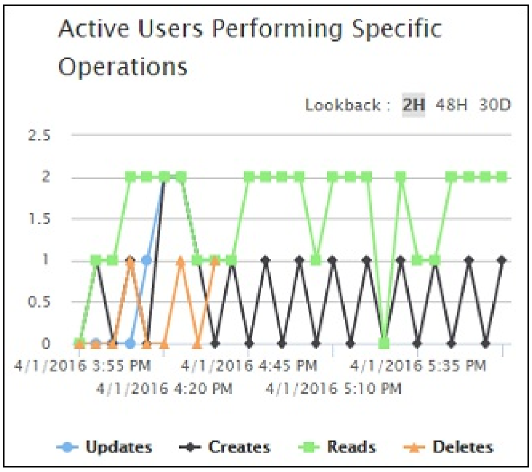

### What's included in this chart

| CHART ELEMENT | DESCRIPTION |
|---|---|
| Creates | List of most active users who performed an operation that caused a `Create` SDK call in the Dynamics 365 instance over the selected time period. |
| Updates | List of most active users who performed an operation that caused an `Update` SDK call in the Dynamics 365 instance over the selected time period. |
| Deletes | List of most active users who performed an operation that caused a `Delete` SDK call in the Dynamics 365 instance over the selected time period. |

### How to interpret this chart

This chart lists the top ten users who performed the most change operations (creates, updates, deletes) in your Dynamics 365 instance.

## Active Users Performing Specific Operations




### What's included in this chart

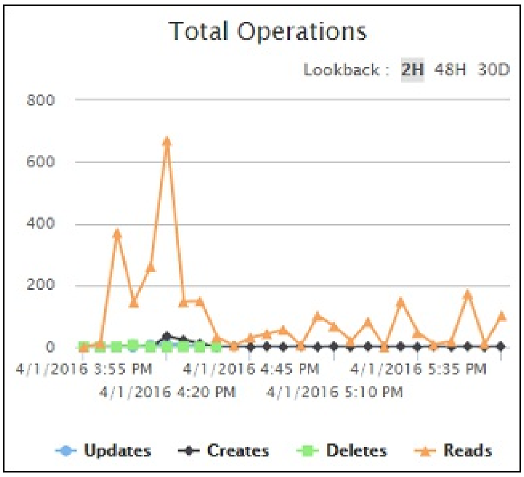
| CHART ELEMENT | DESCRIPTION |
|---|---|
| Updates | Total number of unique users who performed an operation that caused an `Update` SDK call. Updates for all entities are included. |

| CHART ELEMENT | DESCRIPTION |
| --- | --- |
| Creates | Total number of unique users who performed an operation that caused a `Create` SDK call. Creates for all entities are included. |
| Reads | Total number of unique users who performed an operation that caused a `Retrieve` or `Retrieve Multiple` SDK call. Reads for all entities are included. |
| Deletes | Total number of unique users who performed an operation that caused a `Delete` SDK call. Deletes for all entities are included. |

### How to interpret this chart

This chart shows how many unique users are performing which types of operations (create, update, deletes, reads) in your Dynamics 365 instance over the specified time.

## Total Operations



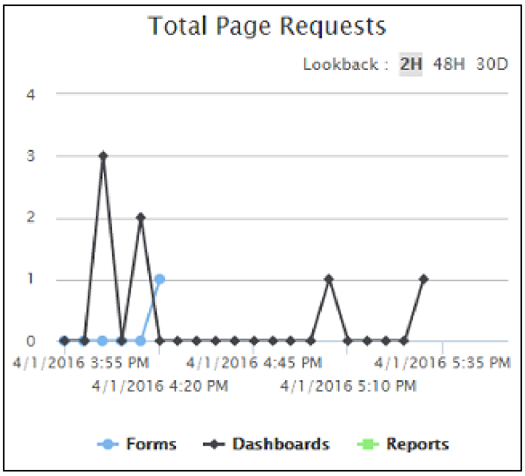

### What's included in this chart

| CHART ELEMENT | DESCRIPTION |
| --- | --- |
| Updates | Total number of **Update** SDK calls. Updates for all entities are included. |
| Creates | Total number of **Create** SDK calls. Creates for all entities are included. |
| Deletes | Total number of **Delete** SDK calls. Deletes for all entities are included. |
| Reads | Total number of **Retrieve** and **Retrieve Multiple** SDK calls. Reads for all entities are included. |

### How to interpret this chart

This chart shows how many operations (create, update, deletes, reads) have occurred in the Dynamics 365 instance over the specified time.

## Total Page Requests




### What's included in this chart

| CHART ELEMENT | DESCRIPTION |
|---|---|
| Forms | Number of requests for form loads. |
| Dashboards | Number of requests for dashboards. |
| Reports | Number of requests for reports. |

### How to interpret this chart

This chart shows the number of page load requests for forms, dashboards, and reports. This is a count of requests received by the Dynamics 365 server. Pages that are cached while browsing won't be counted.

### See also

Use the Organization Insights solution to view metrics about your instance
Developer Guide for Dynamics 365 Customer Engagement

# Manage updates

10/25/2018 • 14 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

On July 6, 2018, we announced some optimizations to how we deliver Dynamics 365 updates: Modernizing the way we update Dynamics 365. Microsoft will continue to support older versions of Dynamics within the timeframe of the details in our Update policy.

> **TIP**
> Many update questions are answered here: FAQ for Dynamics 365 Update Policies.

You have options for when you update your Dynamics 365 Online organization to Dynamics 365 (online), version 9.x. To prepare for a smooth process, use the information in this topic.

You, as a Dynamics 365 system administrator, decide when to install Dynamics 365 (online) major updates for your organization. To update to the latest release of Dynamics 365 (online), complete these two steps:

1. Review the information in the Updates page in the Dynamics 365 (online) Administration Center (https://portal.office.com > **Admin centers** > **Dynamics 365** > **Updates** tab) to find out what instances are ready to update, and the schedule.

2. Approve the update.

   > **IMPORTANT**
   > An update in this document refers to a major version release, such as upgrading from Dynamics 365 version 8.2 to version 9.x. Service updates do not require approval and are applied automatically to your instance.
   >
   > For major version updates, your instance will not be updated unless you approve it. This means your organization will go without the latest features and functionality until you explicitly give approval for the update to happen. Keep in mind, we do have an update policy that will make some updates mandatory, with no approval required. Please see Update policy below for further details.

   You'll receive an email before the update is available with a scheduled update date. This email will also include instructions about how to reschedule the update, if you choose. You'll receive reminders 90, 30, 15, and 7 days before the update begins. The update will happen during a 12-hour window, and during that time your organization might be unavailable for several hours. Most updates typically take 2-4 hours. We'll let you know when your organization is updated and ready to use. For more information, see the Schedule for update communications later in this topic.

## Continuous updates for Dynamics 365 (online)

We are transforming how we do service updates for Dynamics 365 (online). We will deliver two major releases per year - April and October - offering new capabilities and functionality. These updates will be backward compatible, so your apps and customizations will continue to work post update. New features with major, disruptive changes to the user experience are off by default. This means administrators will be able to first test then enable these features for their organization.

In addition to the two major updates, we will continue to deploy regular performance and reliability improvement updates throughout the year. We are phasing deployments over several weeks following safe deployment practices and monitoring updates closely for any issues.

If you're running Microsoft Dynamics CRM Online, please review the following:

- Important information for CRM Online customers
- Switch from Dynamics CRM Online to Dynamics 365 (online)
- Quickly navigate with the Office 365 app launcher and the Dynamics 365 home page

## Update policy

Since every customer will be updated on the continuous delivery schedule, your organization needs to update to the latest version.

For customers who are currently running older versions of Dynamics 365, we will continue to provide you with the ability to schedule an update to the latest version and want to make sure this effort is as seamless as possible through continuous improvements in our update engine. We will send reminders to schedule your update to Dynamics 365 administrators.

- For Dynamics 365 (online) customer engagement applications, we sent update communications in May to all customers running version 8.1 and have scheduled updates.
- Dynamics 365 (Online) **version 8.2 will be fully supported until January 31, 2019**. Customers running version 8.2 should plan to update to the latest version prior to this date.
- From February 1, 2019, onwards, we will only support the latest generally available version.

Here are the recent versions.

| | VERSION | NAME |
|---|---|---|
| n | 9.x | Dynamics 365, version 9.x |
| n-1 | 8.2 | Dynamics 365, version 8.2 |
| n-2 | 8.1 | Microsoft Dynamics CRM Online 2016 Update 1 |

## Update scenarios

Your Dynamics 365 (online) update process depends on what version you have and how you'd like to update. Consider the following scenarios.

> **NOTE**
> For information on Dynamics 365 (online) instances, see Manage Dynamics 365 (online) instances.

### CRM Online 2016 Update 1 – Approach One (recommended)

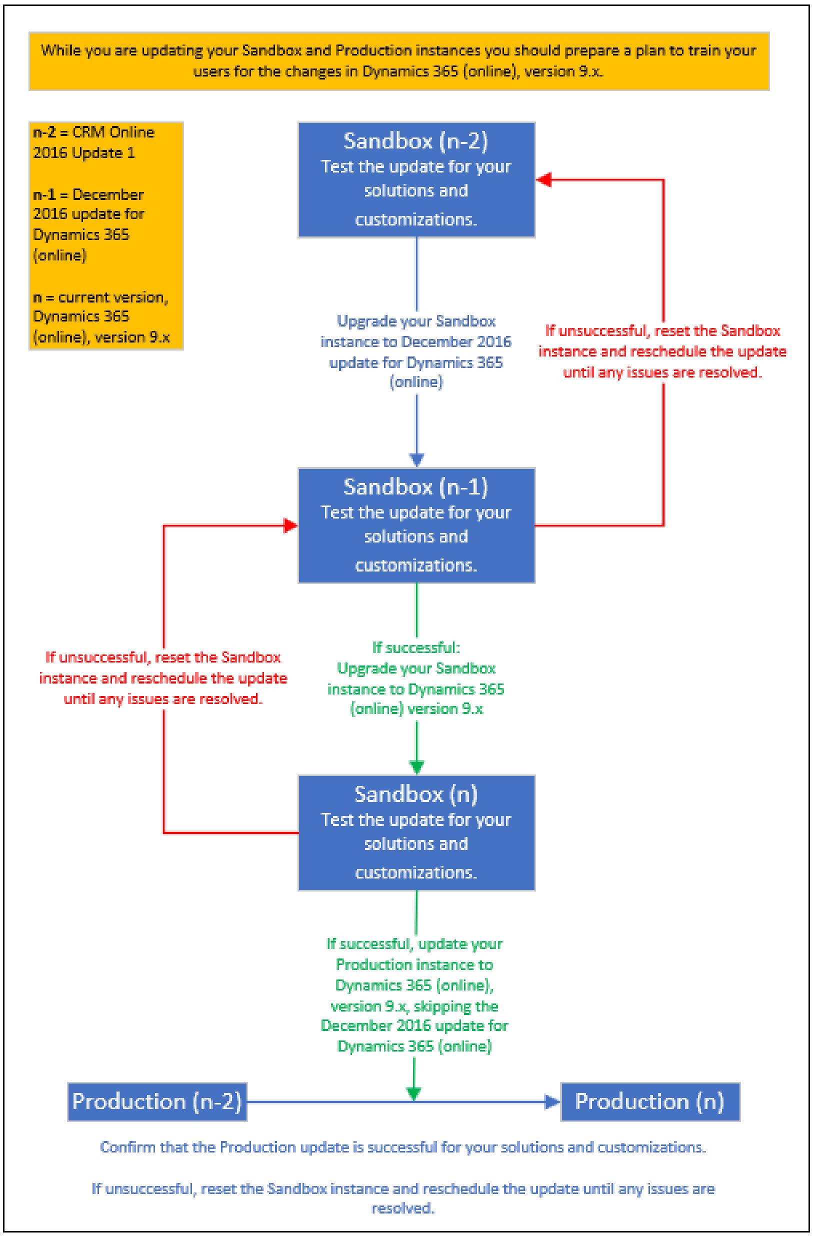
This scenario applies to those who have Production and Sandbox instances of CRM Online 2016 Update 1 (n-2).

For version information, see: Dynamics 365 (online) releases

| VERSION | | UPDATE TO |
|---|---|---|
| Sandbox (n-2) | → | Sandbox (n-1) |
| Sandbox (n-1) | → | Sandbox (n) |
| Production (n-2) | → | Production (n) |

n = current version, Dynamics 365 (online), version 9.x

**Recommended update approach**




## CRM Online 2016 Update 1 – Approach Two

This scenario applies to those who have Production and Sandbox instances of CRM Online 2016 Update 1 (n-2).

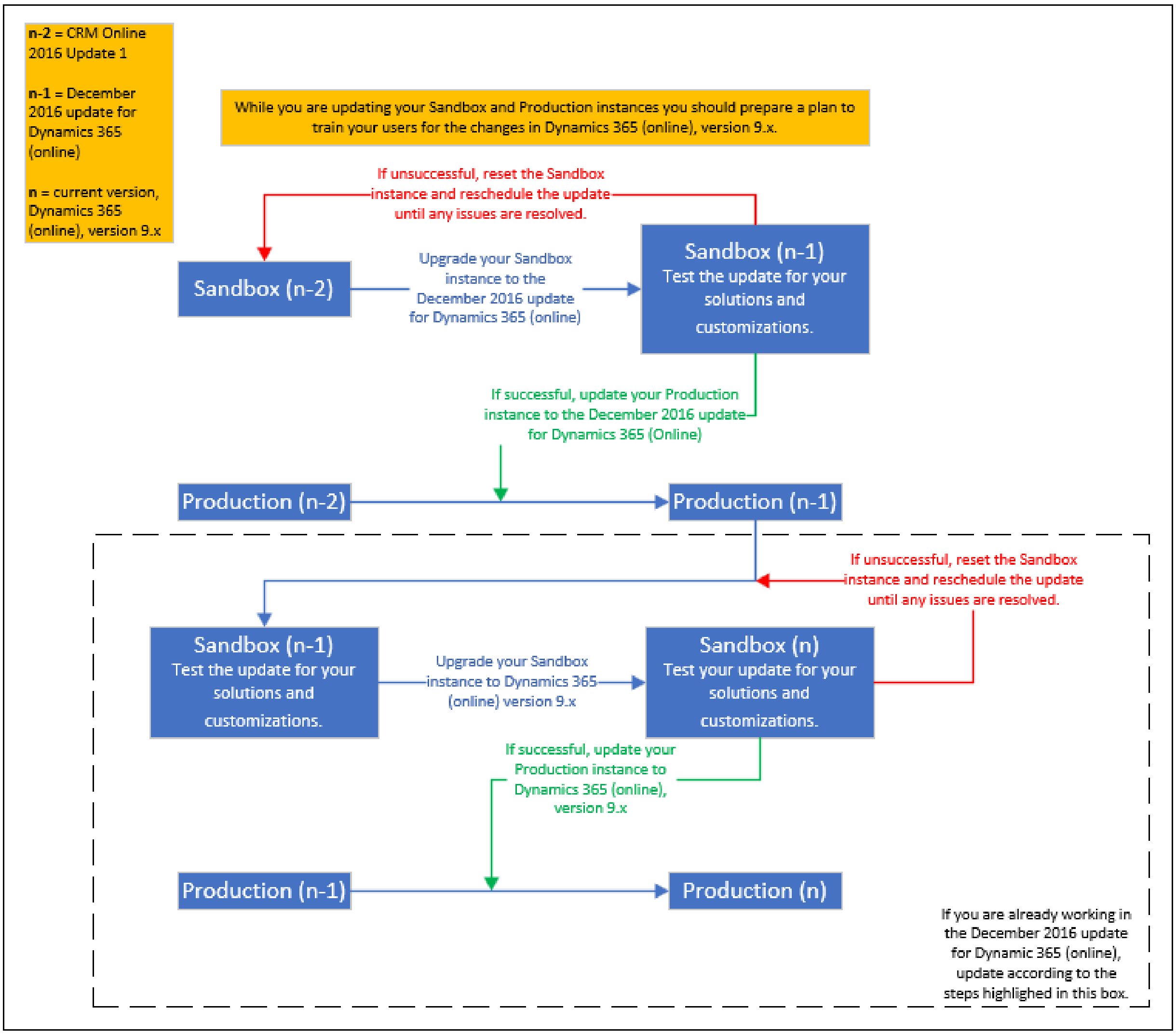
For version information, see: Dynamics 365 (online) releases

| VERSION | | UPDATE TO |
|---|---|---|
| Sandbox (n-2) | → | Sandbox (n-1) |
| Production (n-2) | → | Production (n-1) |

| VERSION | | UPDATE TO |
|---|---|---|
| Sandbox (n-1) | → | Sandbox (n) |
| Production (n-1) | → | Production (n) |

n = current version, Dynamics 365 (online), version 9.x

**Recommended update approach**




## December 2016 update for Dynamics 365 (online)

This scenario applies to those who have Production and Sandbox instances of December 2016 update for Dynamics 365 (online) (n-1).

For version information, see: Dynamics 365 (online) releases

| VERSION | | UPDATE TO |
|---|---|---|
| Sandbox (n-1) | → | Sandbox (n) |
| Production (n-1) | → | Production (n) |

n = current version, Dynamics 365 (online), version 9.x

**Recommended update approach**

Follow the process in the dashed box in the flowchart above.

# Recent versions of Dynamics 365 (online)

To determine your version, sign in to Dynamics 365, and in the upper-right side of the screen, click the **Settings** button > **About**.

For recent versions, see Dynamics 365 (online) releases

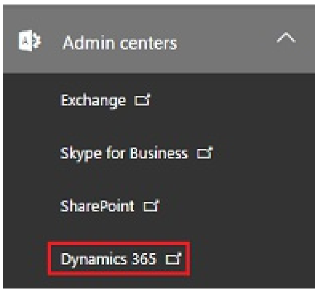
# How will I know my organization is ready to update?

Dynamics 365 system administrators will be informed of updates to Dynamics 365 (online) in multiple ways.

**Check your instances in the Dynamics 365 Administration Center**

1. Sign in to https://portal.office.com.

2. In the Office 365 admin center, click **Admin** > **Dynamics 365**.

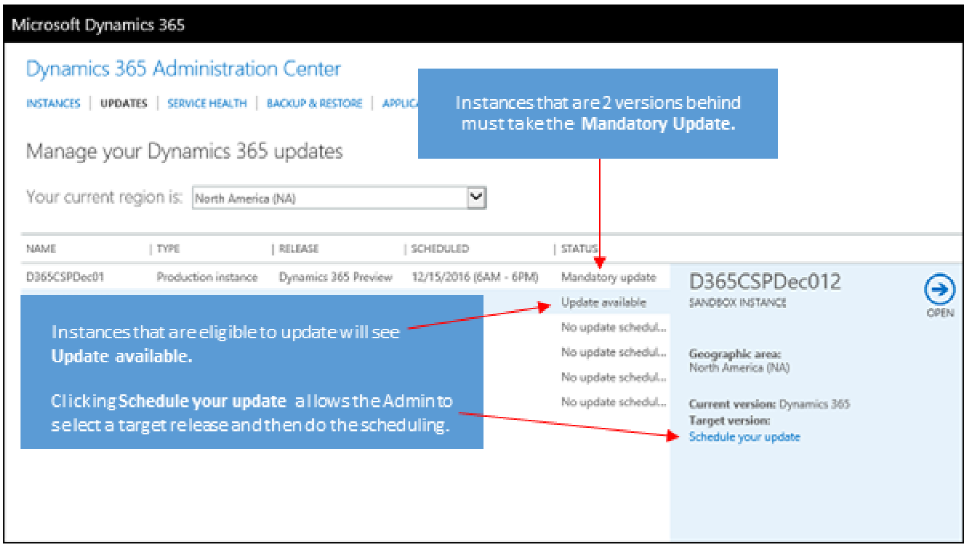



3. On the Instances page, click **Updates**, and then review the update status for your Dynamics 365 (online) instances.

   Note the following:

   - Instances that are eligible to update will see **Update is Available**.

   - Clicking **Schedule your update** lets the admin select a target release and then do the scheduling.

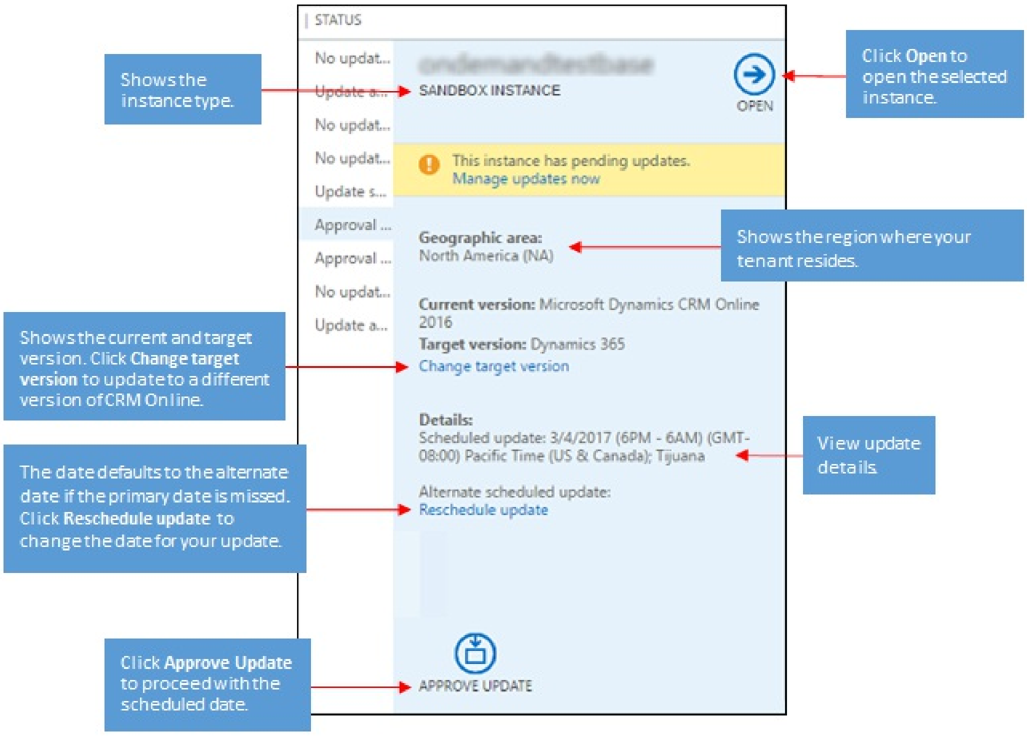



**Update notification emails are sent to admins**

Dynamics 365 system administrators will receive an email from the Dynamics 365 (online) Team. You can use the links in the email to learn more about your update or reschedule it.

# Deciphering the update information

The “Manage your Dynamics 365 updates” page is your source for useful information and actions to take regarding your update.




> **NOTE**
>
> If you are eligible to update to multiple versions of Dynamics 365 (online), you'll see an option **Change target version**. Large companies with extensive and complex customizations to their Dynamics 365 may choose to upgrade to a later release instead of the first available. So you get the most up-to-date features and fixes, we highly recommend you upgrade to the latest version when available.

## Approve an update

You must be a Dynamics 365 system administrator to approve updates.

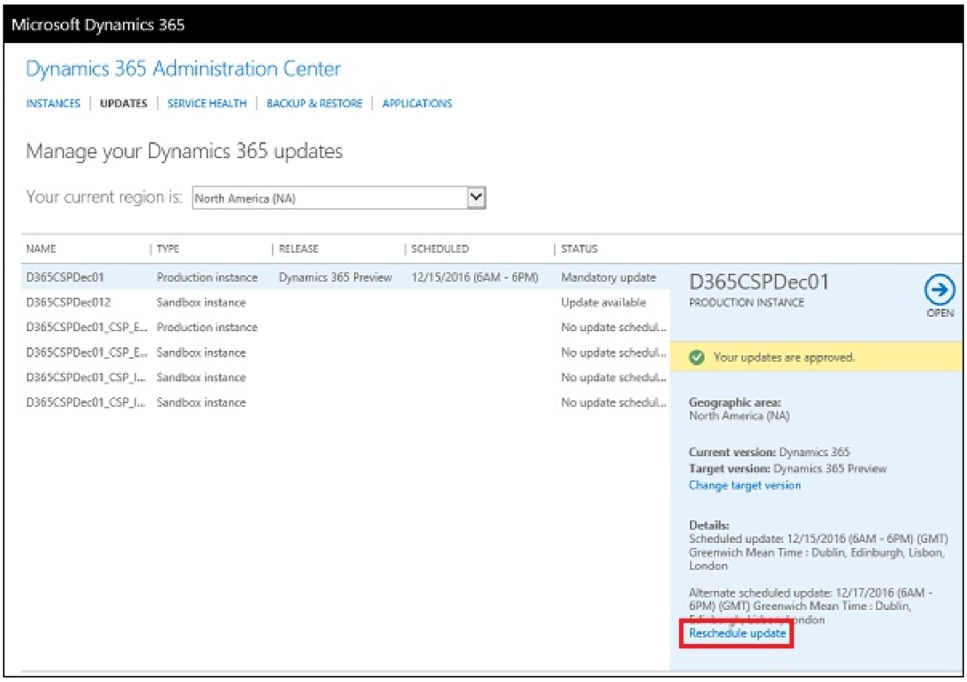
1. Sign in to https://portal.office.com.
2. In the Office 365 admin center, click **Admin** > **Dynamics 365**, and then on the Instances page click **Updates**.
3. Choose the instance to approve.
4. Click **Approve Update** to approve and proceed with the update.

> **NOTE**
>
> Once you approve an update, you can still reschedule it as long as the update has not started.

## Reschedule an update

You must be a Dynamics 365 system administrator to reschedule updates.

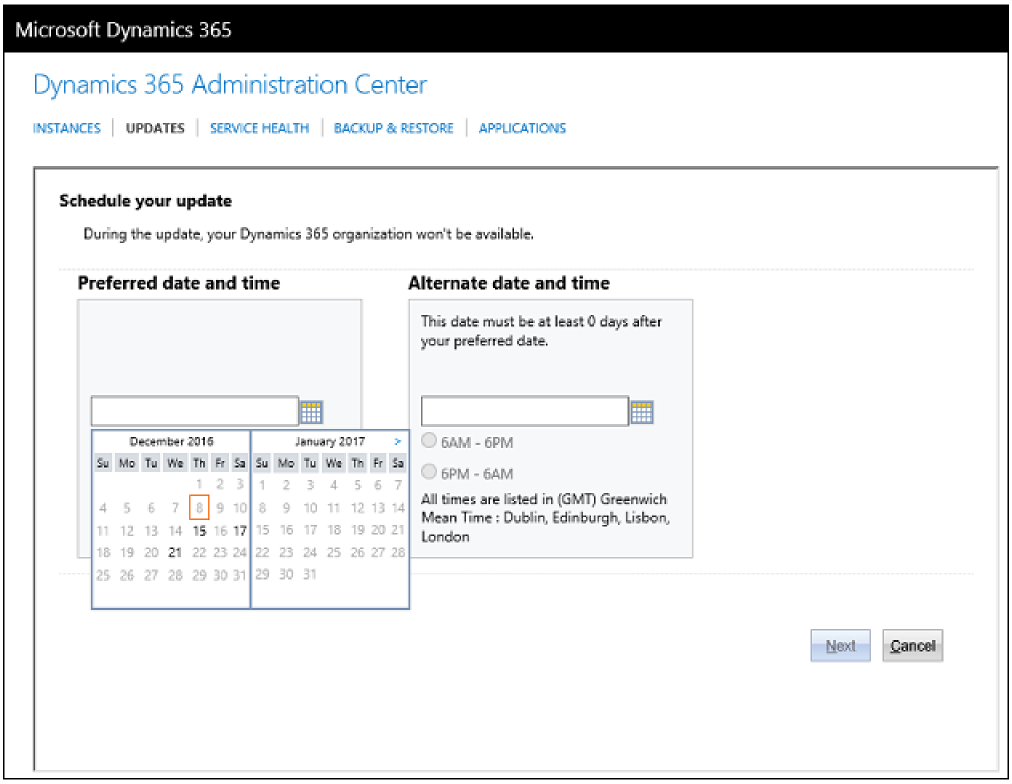
1. Sign in to https://portal.office.com.
2. In the Office 365 admin center, click **Admin** > **Dynamics 365**, and then on the Instances page click **Updates**.
3. Choose the instance update to reschedule, and then click **Reschedule update**.



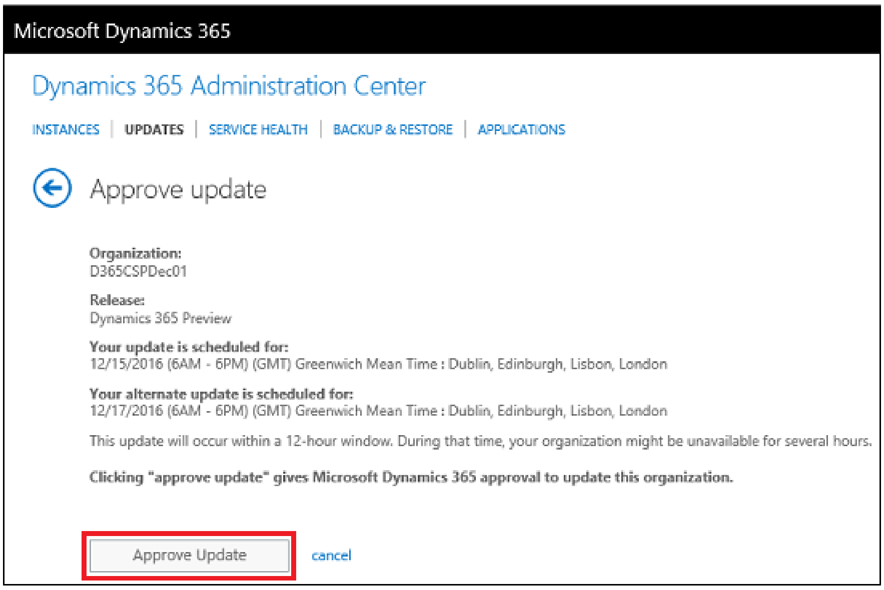

4. If you are eligible to update to multiple versions of Dynamics 365 (online), you'll see a page to select a target version. Select a version, and then click **Next**.

> **NOTE**
>
> Large companies with extensive and complex customizations to their Dynamics 365 may choose to upgrade to a later release instead of the first available. So you get the most up-to-date features and fixes, we highly recommend you upgrade to the latest version when available. Keep in mind, if you are two versions behind the current version you will have a mandatory update. See Update policy for more information.

5. Select new preferred and alternate dates and times for the update, and then click **Next**.



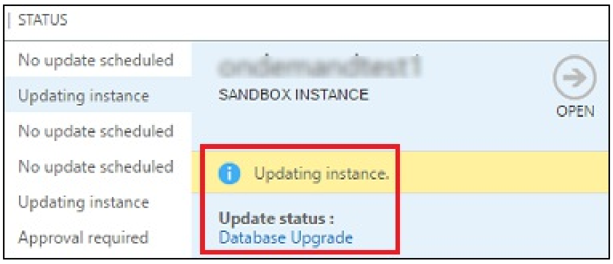

6. Review the new dates and times, and then click **Approve Update**.




7. The Status column will indicate your update is approved.

# Update status

To better track and manage your Dynamics 365 (online) updates, we added more granular update status to the Updates page. At the date and time of your update, the status for your instance will show **Updating instance**.




There are **four** stages of an update:

| STATUS | DESCRIPTION |
| --- | --- |
| Queued (Not Started) | The update is queued and will start at the scheduled time. |
| Backup | The Dynamics 365 (online) instance is being backed up. A copy of the instance is backed up before the update for recovery purposes. |
| Restore | The Dynamics 365 (online) instance is being restored. |
| Database Upgrade | The Dynamics 365 (online) instance is being updated. |

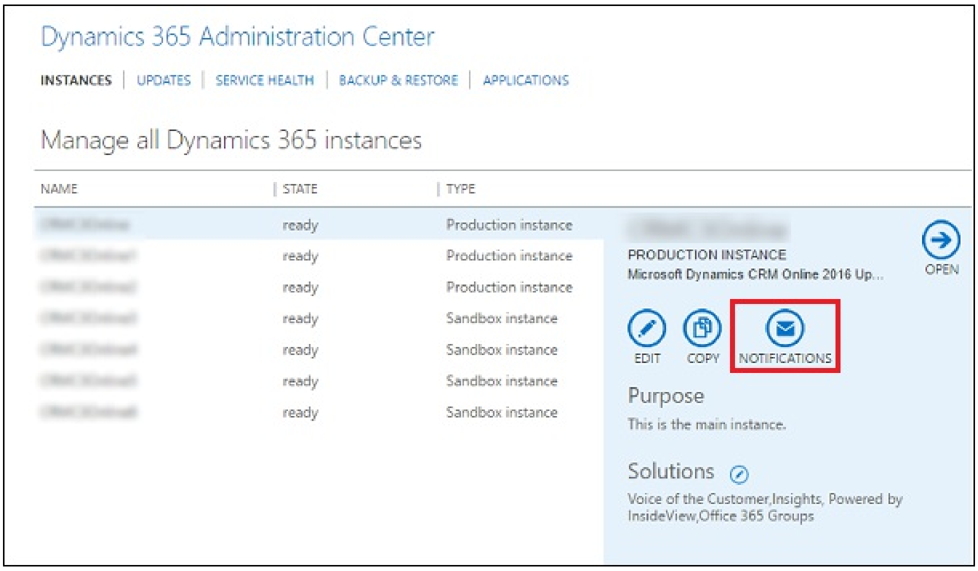
# Send email notifications to multiple recipients

By default, Dynamics 365 admins will receive update notifications. You can add others to receive update notifications.

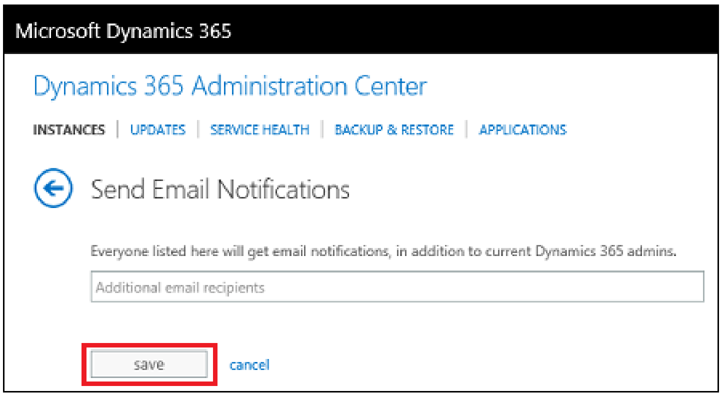
1. Sign in to https://portal.office.com.

2. In the Office 365 admin center, click **Admin** > **Dynamics 365**, and then click **Instances**.

3. Choose an instance that has notifications you want to change, and then click **Notifications**.




4. Enter the email addresses of people to receive update notifications for the selected instance, and then click **Save**.




## What happens after an update is approved?

When your update has started, you'll see **Update in progress** under **Status**. The **Reschedule** option will no longer be available.


When your update is done, you'll see **Updated successfully**.


## Prepare your Dynamics 365 organization for the update

Dynamics 365, version 9.x contains a number of exciting changes. To take advantage of new features, you need to ensure any customizations are compatible with this update.

**Prepare your users**

To prepare your users for the changes to Dynamics 365 (online), visit What's new in Dynamics 365 (online), version 9.

## Checklist for the Dynamics 365 (online) update

Most of the update process is handled by Microsoft. However, there are a few things that you must do to prepare.

1. **Know when your update is scheduled.**

   You will be informed of a pending update in multiple ways. See How will I know my organization is ready to update? in this topic.

2. **Involve your Dynamics 365 partner.**

   If you have a Dynamics 365 partner of record, we strongly recommend that you contact them for guidance and assistance. If you do not have a partner, you may consult the Microsoft AppSource to identify a partner. Please note that there may be charges from partners for their services.

3. **Watch for communications from Microsoft.**

   We will send you several communications about this subject to keep you informed about the update. In addition, we send email communications to users who have the System Administrator role in Dynamics 365. Please make sure the email accounts associated with those user accounts are valid and being monitored. Communications will come from crmoln@microsoft.com, or for partners, you will also receive communications from the Dynamics 365 Partner Team: crmteam@microsoft.com.

4. **Verify your customizations are compatible.**

   You should take the time before your update to verify that customizations are compatible. You should do this early enough that you have time to fix any identified issues. Additionally, Microsoft will run a number of automated tests, and if any of those tests fail in your instance, we will email the administrator a list of potential issues we have identified.

5. **Create a non-production (Sandbox) instance in which you can test your customizations.**

   Ideally, you should test your customizations prior to update. This will also give you the opportunity to verify compatibility of any third-party customizations. If you identify any potential issues, please work with the solution provider to correct any issues that arise. More information: Manage Dynamics 365 (online) Sandbox instances

6. **Notify your users prior to the update of Dynamics 365.**

   It is a best practice to notify your users that the system will be unavailable during the update. To get more resources to prepare users for the update, please visit Onboard your organization and users.

7. **Watch for Update Completion or Reschedule emails from Microsoft.**

   Once your organization is updated, you'll receive a notification from Dynamics 365 (online) indicating that your organization is ready to use.

## Schedule for update communications

| WHEN | RECIPIENT | IN-PRODUCT ALERT | EMAIL | ADMIN CENTER |
| --- | --- | --- | --- | --- |
| Update scheduled | All Admins | Yes | Yes | Yes |
| 90 days before update | All Admins | No | Yes | Yes |

| WHEN | RECIPIENT | IN-PRODUCT ALERT | EMAIL | ADMIN CENTER |
|---|---|---|---|---|
| 30 days before update | All Admins | No | Yes | Yes |
| 15 days before update | All Admins | No | Yes | Yes |
| 7 days before update | All Admins | Yes | Yes | Yes |
| Schedule confirmed by Admin | All Admins | No | No | Yes |
| Update in progress | All Admins and Users | No | No | Yes |
| Update successful | All Admins and Users | No | Yes | Yes |
| Fallback to secondary update | All Admins | No | Yes | Yes |
| Update rescheduled | All Admins | No | Yes | Yes |

**NOTE**

"All Admins" includes Dynamics 365 system administrators and Office 365 Global administrators.

## Notice about Online Policies

Please review Notice About Online Policies and Similar Documents.

**See also**

FAQ for Dynamics 365 Update Policies
Policies and Communications for Dynamics 365 (online)

Manage email notifications

# Policies and Communications for service incidents

10/25/2018 • 9 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

**IMPORTANT**

Starting October 15, 2018, we will be sending our service notifications from a new email address. The new email addresses may cause the notifications to bypass existing rules, or arrive in your Junk email folder. Please be sure to check your settings so you do not miss any important announcements or service communications.

New email addresses:

- Microsoft Dynamics 365 - msdynamics365@microsoft.com
- Microsoft Dynamics 365 for Finance and Operations - msdyn365finops@microsoft.com

## Introduction

Microsoft regularly maintains and updates Dynamics 365 (online) to ensure security, performance, and availability, and to provide new features and functionality. From time to time, Microsoft also responds to service incidents. For each of these activities, the Dynamics 365 admin for your organization, or recipients added to the notification list by the Dynamics 365 admin, receives email notifications. During a service incident, a Dynamics 365 (online) customer service representative may also call and follow up with an email.

If you're not sure who your Dynamics 365 admin is, see Find your Dynamics 365 administrator or support person.

If you want to change who receives email communications, see Manage email notifications.

If you're a Dynamics 365 admin, you can also see the latest status of updates and incidents in the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

## System updates

The Dynamics 365 (online) team regularly performs security updates, and major and minor service updates.

### Security updates

The Dynamics 365 (online) team regularly performs the following to ensure the security of the system:

- Scans of the service to identify possible security vulnerabilities
- Assessments of the service to ensure that key security controls are operating effectively
- Evaluations of the service to determine exposure to any vulnerabilities identified by the Microsoft Security Response Center (MSRC), which regularly monitors external vulnerability awareness sites

The Dynamics 365 (online) team identifies and tracks any identified issues, and takes swift action to mitigate risks when necessary.

#### How do I find out about security updates?

Because the Dynamics 365 (online) team strives to apply risk mitigations in a way that doesn't require service downtime, Dynamics 365 administrators usually don't receive emails for security updates. If a security update does require service downtime, it is considered planned maintenance.

For more information about Dynamics 365 (online) security, see Dynamics 365 (online) Trust Center.

**Major service updates**

Dynamics 365 (online) typically releases two major service updates per year. Major service updates provide new features and functionality to Dynamics 365 (online).

> **NOTE**
>
> For information about minor service updates, see Service updates.

Improvements in the update process put the power in your hands for scheduling your organization's service updates. You can choose from a list of available dates. Service updates are only applied after they are approved by the Dynamics 365 (online) admin - please review the important note below outlining the Dynamics 365 online update policy. This helps you to plan well in advance for your upgrade path, while using your sandbox organization to properly test and evaluate the service updates with your existing production code.

> **IMPORTANT**
>
> Be sure to check out Update policy for important information about updating to the latest version.

**How do I find out about major service updates?**

The Dynamics 365 (online) team preschedules customers for the service update and emails Dynamics 365 (online) admins 90 days before the scheduled update. Dynamics 365 (online) admins receive additional emails at 90 days, 30 days, 15 days, 7 days, 0 or day of, and post update.

In the email, you have the opportunity to either approve the scheduled date or reschedule the update from a list of dates. All customers are updated during the defined service update release period, usually over a three-month window.

To find out more about rescheduling service updates, see Manage Dynamics 365 (online) updates.

To find out what's new and how to prepare for the next release, check out the following resources:

- Important changes coming in Dynamics 365 Customer Engagement

Emails regarding the scheduling or rescheduling of your update will be sent with a light-blue banner.


**Minor service updates**

Minor service updates contain customization changes to support new features, product improvements, and bug fixes.

A list of minor service updates can be found on our Releases page.

# System maintenance

**Planned maintenance**

Planned maintenance includes updates and changes to the Dynamics 365 (online) service to provide increased stability, reliability, and performance. These changes can include:

- Hardware or infrastructure updates

- Integrated services, such as a new version of Office 365 or Azure
- Dynamics 365 (online) service changes and software updates
- Minor service updates to Dynamics 365 (online) that occur several times per year. See Service updates.

**Maintenance timeline**

To limit the impact on users, the maintenance window is planned according to the region where environments are deployed. The following list shows the maintenance window for each region. The times are shown in Coordinated Universal Time (UTC, which is also known as Greenwich Mean Time).

- OCE: 11 AM to 9 PM
- JPN: 10 AM to 7 PM
- APJ: 2 PM to 8 PM
- IND: 12 PM to 9 PM
- EUR: 6 PM to 3 AM
- GBR: 6 PM to 3 AM
- SAM: 12 AM to 10 AM
- CAN: 1 AM to 10 AM
- NAM: 2 AM to 11 AM
- GCC: 2 AM to 11 AM
- DEU: 5 PM to 2 AM

**Prior notification**

- Your organization will receive a Maintenance notification through the Office 365 Message Center. Additionally, for maintenance activities that impact your ability to use the service, Dynamics 365 (online) System Administrators will receive an email notification.
- You can also view notifications in the Office 365 Admin mobile app on your mobile device.
- In addition, you can see the schedule and status of planned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

The following stakeholders will be notified about the upcoming maintenance:

- Project owners
- Organization admins
- Environment admins
- Other people who are specified on the list during deployment or through the **Notify** button on the Environment Details pane

**During the update**

To report an issue that is identified during update validation, file a support ticket with Microsoft and append the title with 'Planned Maintenance Window'.

If the patching of a platform update fails or takes longer than the specified maintenance window, a notification will be posted on the Service health dashboard. This issue is considered the highest priority, and the product team becomes involved to address it. However, if there is no quick fix, Microsoft will roll back the update so that the environment can be brought back to a healthy state as soon as possible.

If the patching fails during an operating system–level update, the specific patch is skipped and will be applied in the next update cycle.

**Post-update notification**

If your update is completed within the defined maintenance window, you won't receive any notification when the update is completed.

You can verify that the update was completed successfully by checking the version number on the About page.

We are planning to add the ability to notify customers when the downtime window is completed.

**How to sign up for notifications**

If partners, independent software vendors (ISVs), and other interested parties want to be notified about upcoming updates, they have two options:

- Check the Service health.
- Ask to be added to the project as a relevant stakeholder (project owner, environment admin, or additional stakeholder).

**Unplanned maintenance**

From time to time, Dynamics 365 (online) inevitably encounters unplanned issues that require changes to ensure availability. Microsoft strives to provide as much notification as possible during these events. Because these events can't be predicted, they are not considered planned maintenance.

When this happens, your organization receives an "Unplanned Maintenance" email. These emails go out to all Dynamics 365 (online) System Administrators in every Dynamics 365 (online) instance that is affected by the unplanned maintenance.

You can also see the status of current unplanned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.
Planned and unplanned maintenance emails can be identified by the light-orange banner.


# Service incidents

A service incident occurs when your organization is inaccessible or you're unable to use the service or one of its components. Examples include:

- Your users get a "page not found" or 404 error when they try to access Dynamics 365 (online).
- Your users cannot sign in to your organization.
- Your users can sign in, but cannot save their changes.
- Your users can sign in, but see a blank screen.

**How do I find out about service incidents?**

If you open a case to report a service incident, a Microsoft customer support representative will call your Dynamics 365 admin and follow up with an email when the service incident is resolved.

**Major service incidents**

A major service incident occurs when multiple organizations can't access the service.

**How do I find out about major service incidents?**

The Microsoft policy is to send email updates to the Dynamics 365 admins of affected customers as soon as we are aware of a major service incident, and a final email once the issue is considered resolved.

You can also see the status of major service incidents in your Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

If the service incident breaches your Service Level Agreement, you can claim a billing credit according to the conditions of your Service Agreement. If you need help with this, see Billing FAQs for Dynamics 365 (online).

Major service incident emails can easily be identified by the red banner.


**Service restored**

Microsoft will send you an email when normal system services have been restored. You can easily identify these emails by the light-green banner.


**Post-Incident Report**

In addition, five business days after the incident resolution, the Dynamics 365 (online) team publishes a post-incident report (PIR) to the Office 365 service health page. This report summarizes the following details about the incident:

- Description
- Root cause
- Customer impact
- Start date and time
- Resolution date and time
- Next steps

**Communications for releases, package deployments, and awareness**

Communications emails are specific to managing the Dynamics 365 Service, including changes with the service, releases or feature offerings. They can be informational in nature, drive specific actions, or both. The target audience for these communications are Dynamics 365 System Administrators or individuals designated to running the service. You can easily identify these by the light-blue banner.


**Post-purchase customer lifecycle communications**

Once a customer has purchased Dynamics 365 (online), we send a series of helpful email communications to Dynamics 365 administrators during the first year. These communications direct customers to a number of resources that will assist both administrators and users to successfully adopt and expand their use of Dynamics 365 (online).

You can easily identify these communications by the dark-blue banner.

**Notice about Online Policies**

Please review Notice About Online Policies and Similar Documents.

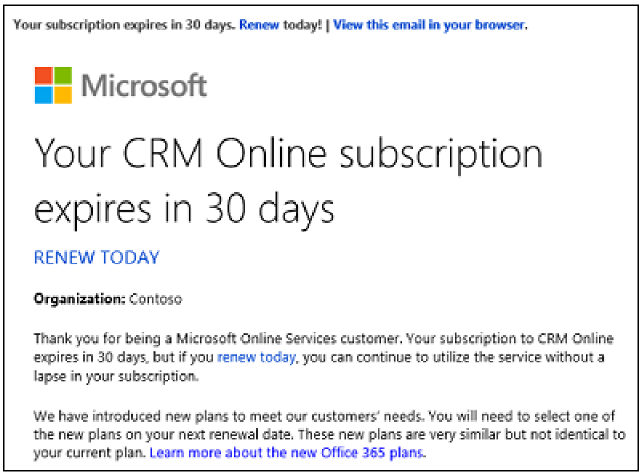
# Switch from Dynamics CRM Online to Dynamics 365 (online)

8/24/2018 • 9 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Your Dynamics CRM Online plan is being retired. When it's time to renew, you'll need to renew using the new Dynamics 365 plans. To learn more about your options, see Important information for CRM Online customers.

If you're an existing Dynamics CRM Online customer, you will be notified when your subscription will expire. At that time, you'll need to start a new subscription with one of the new Dynamics 365 (online) licenses. You can switch before you receive the expiration notice.


Your subscription expires in 30 days. Renew today! | View this email in your browser.

Microsoft

Your CRM Online subscription expires in 30 days

RENEW TODAY

**Organization:** Contoso

Thank you for being a Microsoft Online Services customer. Your subscription to CRM Online expires in 30 days, but if you renew today, you can continue to utilize the service without a lapse in your subscription.

We have introduced new plans to meet our customers' needs. You will need to select one of the new plans on your next renewal date. These new plans are very similar but not identical to your current plan. Learn more about the new Office 365 plans.

**Dynamics 365 information**

- Dynamics 365
- Dynamics 365 pricing
- Dynamics 365 Licensing Guide
- Existing Customer License Transition Guide
- Business apps in Dynamics 365

## How to renew when your plan is retiring

The easiest way to switch plans is to use the Switch plans button in the Office 365 admin center which launches a wizard. However, using the Switch plans button isn't supported in all situations. In some cases, you might want or need to switch plans manually.

**When to use the Switch plans wizard**

Click the Switch plans button if:

- You want to simplify the renewal process.
- You're going to assign all your users to the same Dynamics 365 plan.

See Use the Switch plans wizard.

#### When to switch plans manually

Manually switch plans if:

- You want more control of the renewal process.
- You have a mix of Dynamics 365 plans to assign users to.
- You're going to purchase fewer licenses in the Dynamics 365 plan than you currently have in your CRM Online plan.

See Switch plans manually.

#### Use the Switch plans wizard

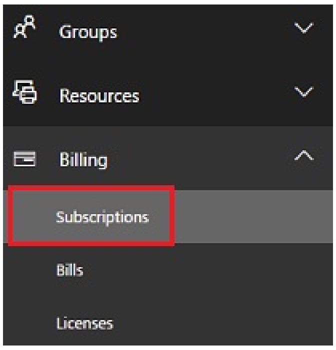
When you click the Switch plans button, you're led through the process of buying a new plan that you can switch your current plan to.

The switch plans wizard does the following:

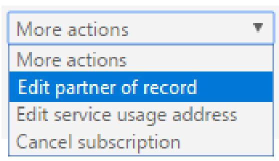
- Leads you through the process of buying a new plan.
- Reassigns all user licenses from your old plan to the new plan.
- Cancels your old plan.

To renew to Dynamics 365 using the Switch plans wizard, follow these steps.

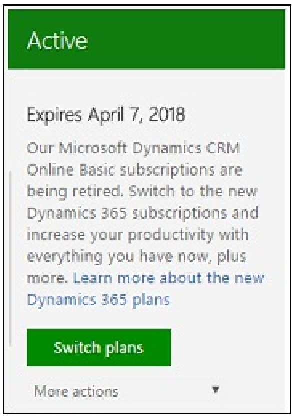
1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Choose **Billing** > **Subscriptions**.



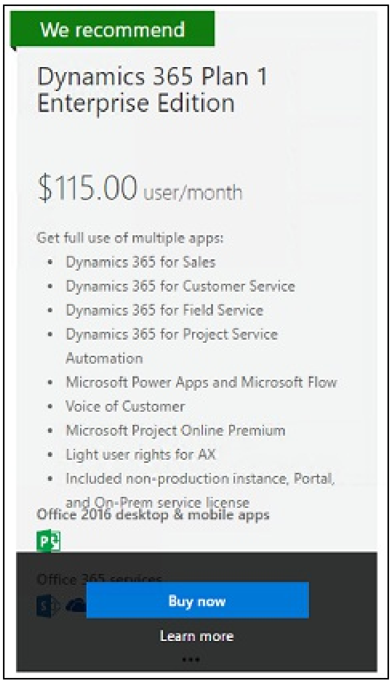

3. If you have a Partner of Record, take note of the Partner ID to use later. Under **Active**, click **More actions** > **Edit partner of record** and record the ID number.




4. Select the plan to renew, and then click **Switch plans**.



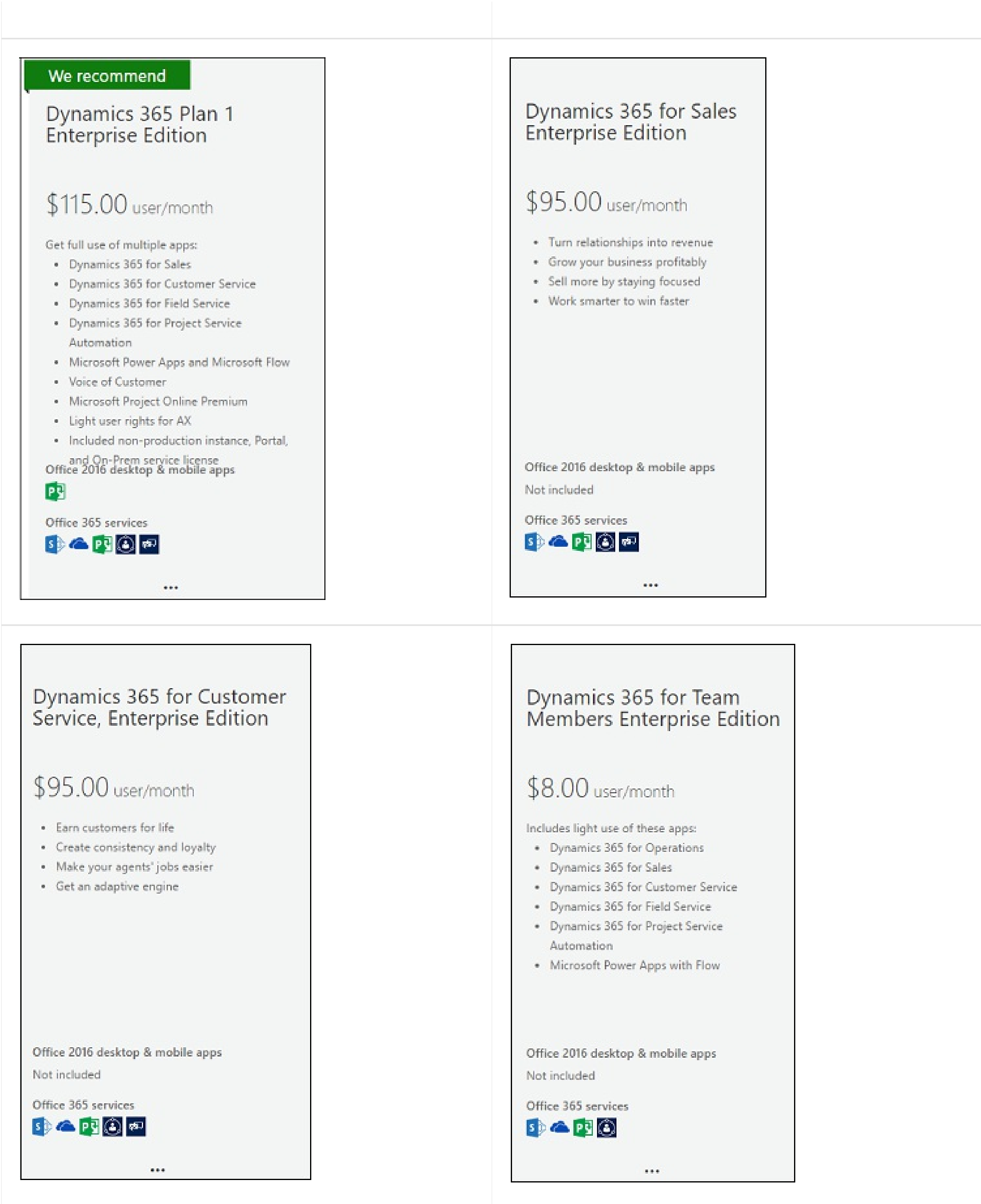

5. Mouse over the subscription you want to switch to, and then click **Buy now**.



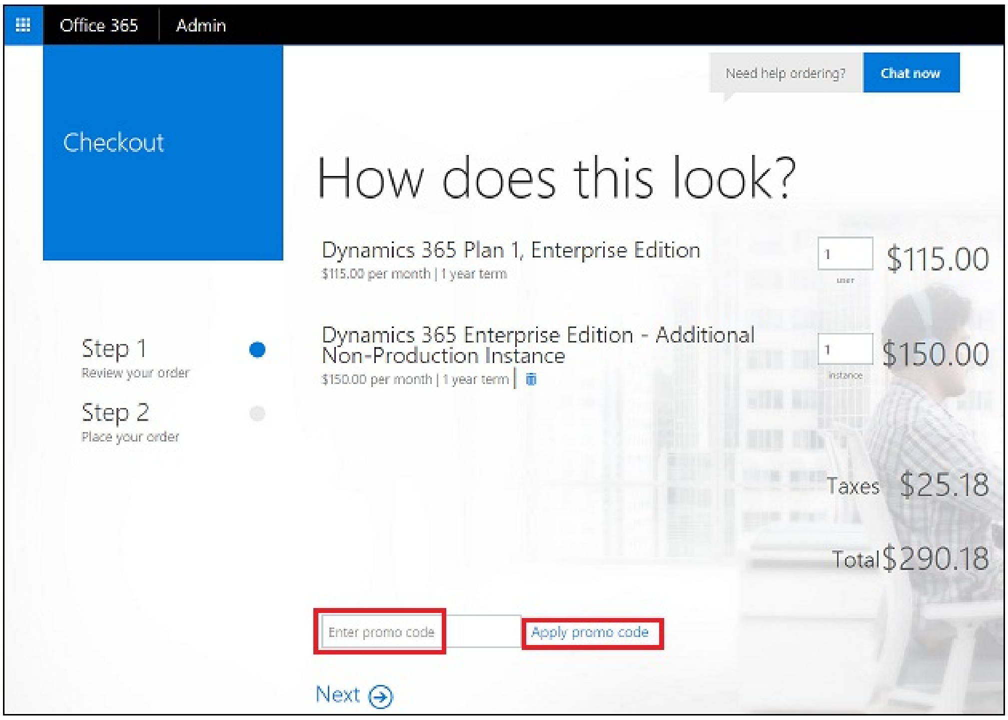

**NOTE**

If you need to purchase a mix of plans, each plan must be purchased separately in order to apply promo codes for discounted pricing and to assign licenses.

Choose a plan to switch to.




6. In the Checkout Step 1 page, click **Have a promo or discount code?**, enter a promo code, and then click **Apply promo code**.

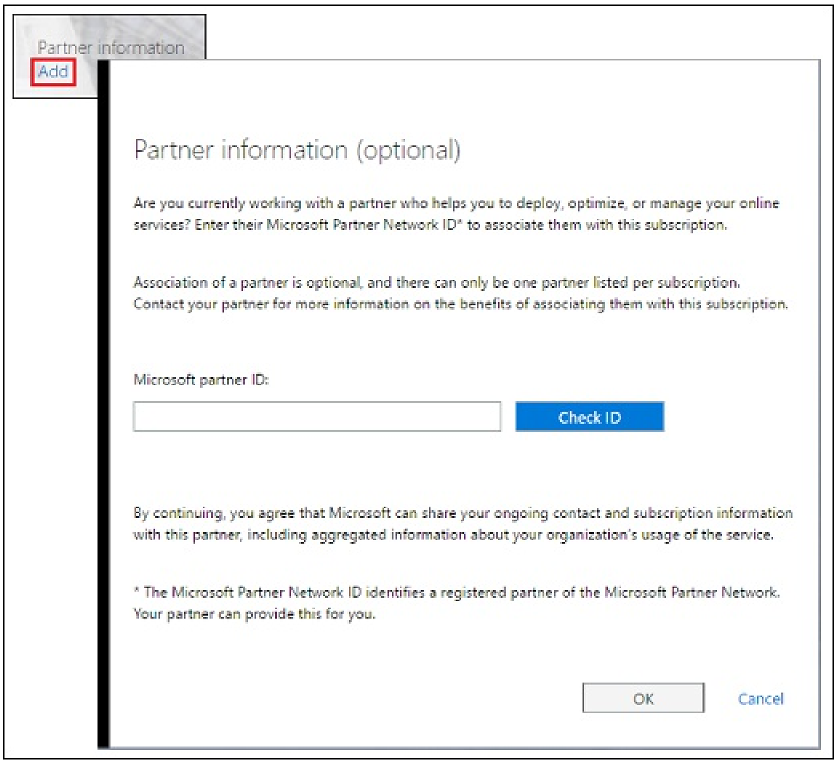



For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. Click on your subscription type to find your promo code, then return and complete the remaining steps.

| SUBSCRIPTION TYPE |
| --- |
| Promo codes: Commercial Web Direct |
| Promo codes: Government Web Direct |
| Promo codes: Faculty Web Direct |
| Promo codes: Student Web Direct |
| Promo codes: Non-profit Web Direct |

> **IMPORTANT**
> If you're considering a mix of plans, you must complete that transition in a separate transaction with each promo code.

7. Click **Next**. On the Checkout Step 2 page, if you have a partner, click **Add** in the right-side of the page, and then use the Partner ID you recorded above.




8. Fill in the information, and then click **Place order**.

#### Switch plans manually

Switching plans manually means completing the following separate procedures instead of using the switch plans wizard.

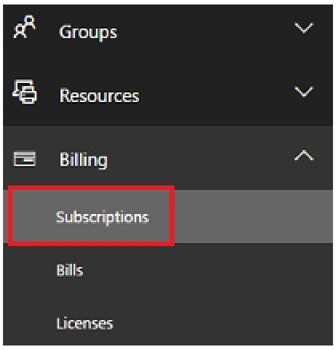
- Buy licenses for the new subscription.
- Verify the new subscription is ready to use.
- Reassign user licenses.
- Remove unneeded licenses from the subscription you're switching from.
- Cancel the original subscription.

To manually switch users to another Dynamics 365 subscription, complete the following phases in the order shown.

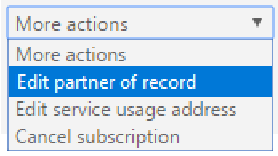
- Phase 1: Buy user licenses for a Dynamics 365 subscription.
- Phase 2: Verify that your subscription has the right number of licenses.
- Phase 3: Reassign user licenses.
- Phase 4: Cancel the CRM Online subscription.

#### Phase 1: Buy user licenses for your Dynamics 365 subscriptions

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Choose **Billing** > **Subscriptions**.



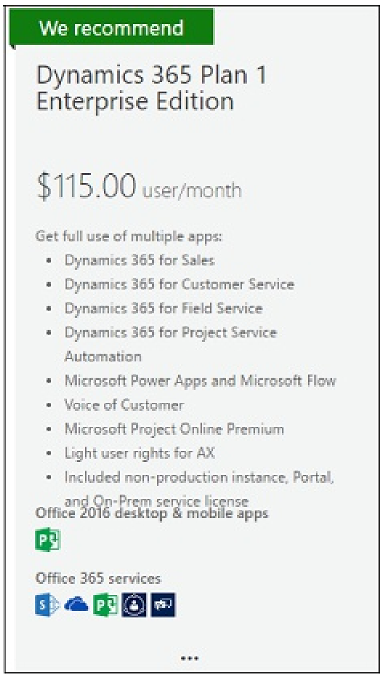
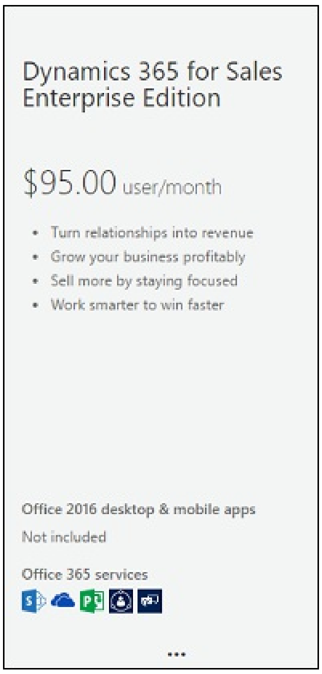

3. If you have a Partner of Record, take note of the Partner ID to use later. Under **Active**, click **More actions** > **Edit partner of record** and record the ID number.

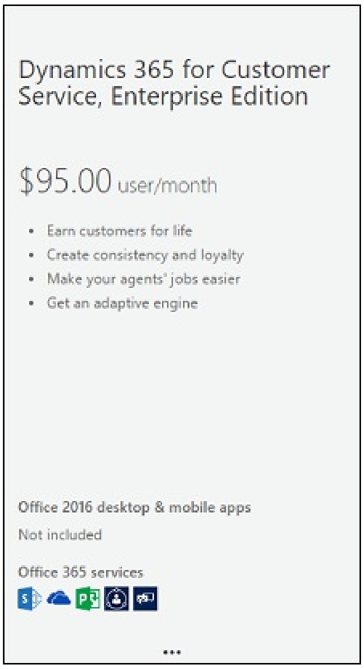


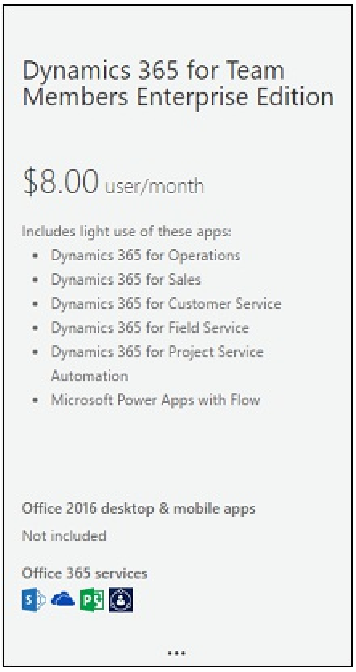

4. Above **Active**, click **+ Add subscriptions** and select the offer for the service you want and proceed through the purchase process.

> **NOTE**
>
> If you need to purchase a mix of plans, each plan must be purchased separately in order to apply promo codes for discounted pricing and to assign licenses.

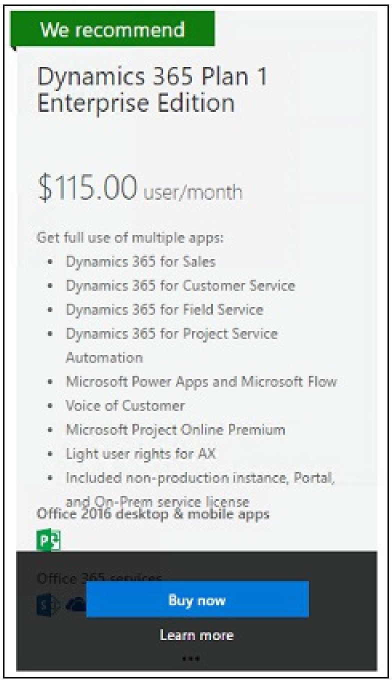
Choose a plan to switch to.

| | |
|---|---|
|   |   |



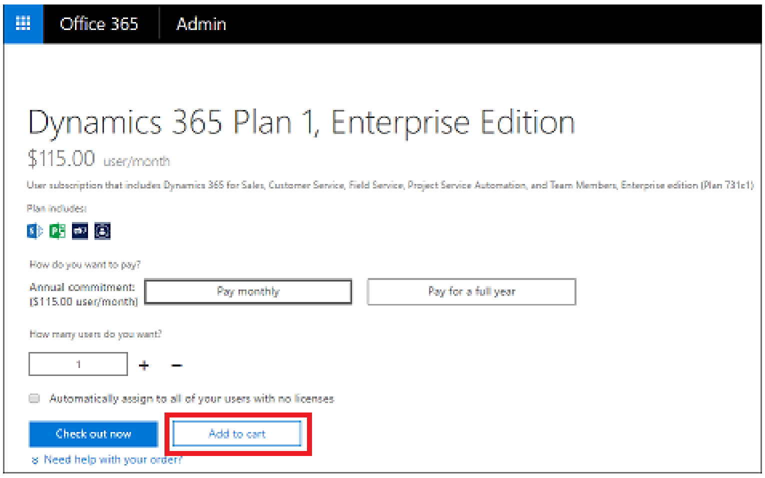




5. Mouse over the subscription you want to switch to, and then click **Buy now**.

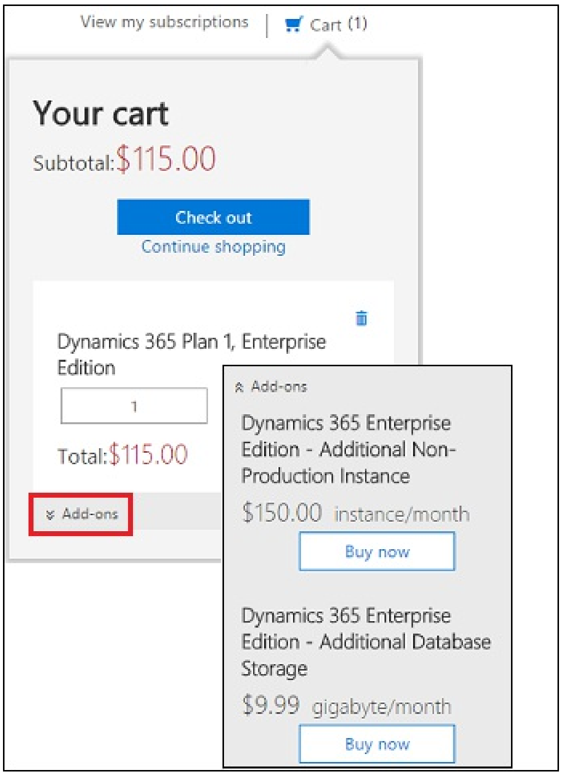



> **NOTE**
>
> If you need to purchase a mix of plans, each plan must be purchased separately in order to apply promo codes for discounted pricing and to assign licenses.

6. Adjust the plan options, and then click **Add to cart**.



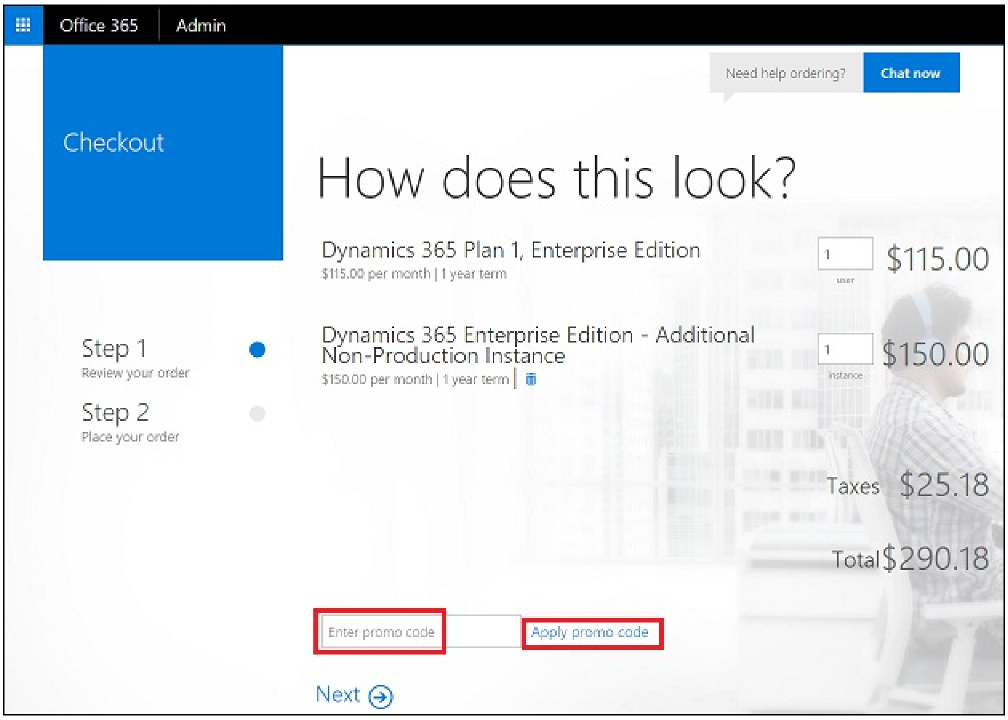

7. In your cart, click **Add-ons** to add Add-ons like an additional non-production instance or more storage.




To see which add-ons are included with Dynamics 365 plans, see Important information for CRM Online customers.

8. Click **Check out** in your cart.

9. In the Checkout Step 1 page, click **Have a promo or discount code?**, enter a promo code, and then click **Apply promo code**.

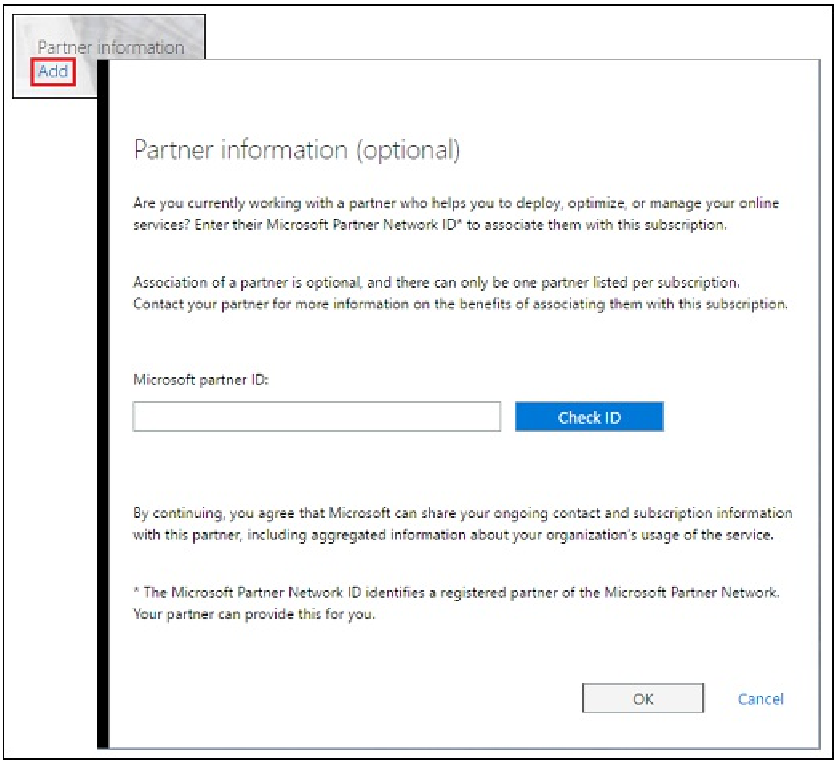



For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. Click on your subscription type to find your promo code, then return and complete the remaining steps.

| SUBSCRIPTION TYPE |
| --- |
| Promo codes: Commercial Web Direct |
| Promo codes: Government Web Direct |
| Promo codes: Faculty Web Direct |
| Promo codes: Student Web Direct |
| Promo codes: Non-profit Web Direct |

> **IMPORTANT**
> If you're considering a mix of plans, you must complete that transition in a separate transaction with each promo code.

10. Click **Next**. On the Checkout Step 2 page, if you have a partner, click **Add** in the right-side of the page, and then use the Partner ID you recorded above.




11. Fill in the information, and then click **Place order**.

**Phase 2: Verify that your subscription has the right number of licenses**

It's important to make sure that all the services inside your new subscription have been set up before moving on to the next phase. If the subscription isn't ready when you first check, try again later.

> **NOTE**
>
> If you purchased a subscription by invoice and a credit check is required, it can take up to two business days before the subscription is available.

1. In the admin center, choose **Billing** > **Subscriptions**.
2. Make sure that the Dynamics 365 subscriptions appear under **Active**, and that the number of purchased licenses is correct.

**Phase 3: Reassign user licenses**

You can use the Office 365 Admin Center to reassign licenses for up to 20 users at a time.

> **TIP**
>
> If you have a lot of users, you can optionally use Remote PowerShell to assign user licenses. To learn how, see Use Office 365 PowerShell to assign licenses to user accounts.

1. In the admin center, choose **Users** > **Active users**.
2. Select the boxes next to the names of the users that you want to move to the Dynamics 365 subscriptions.
3. In the **Bulk actions**-pane, choose **Edit product licenses**.
4. Select **Replace existing product license assignments** > **Next**.
5. Toggle the switches to **Off** to remove a license and **On** to add a license to users.

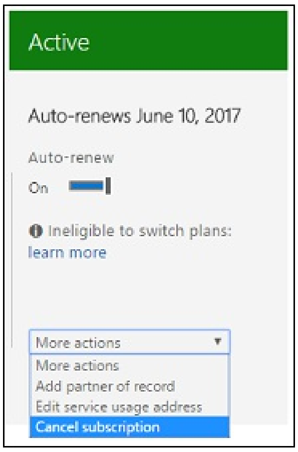
6. When you’re done, choose **Replace** > **Close**.

**Phase 4: Cancel the CRM Online subscription**

Once you've moved all your Dynamics CRM Online users to Dynamics 365 plans, you're ready to cancel your Dynamics CRM Online subscription.

> **TIP**
> Be sure to assign Dynamics 365 licenses to all your users before cancelling your Dynamics CRM Online subscription so current users don't lose access.

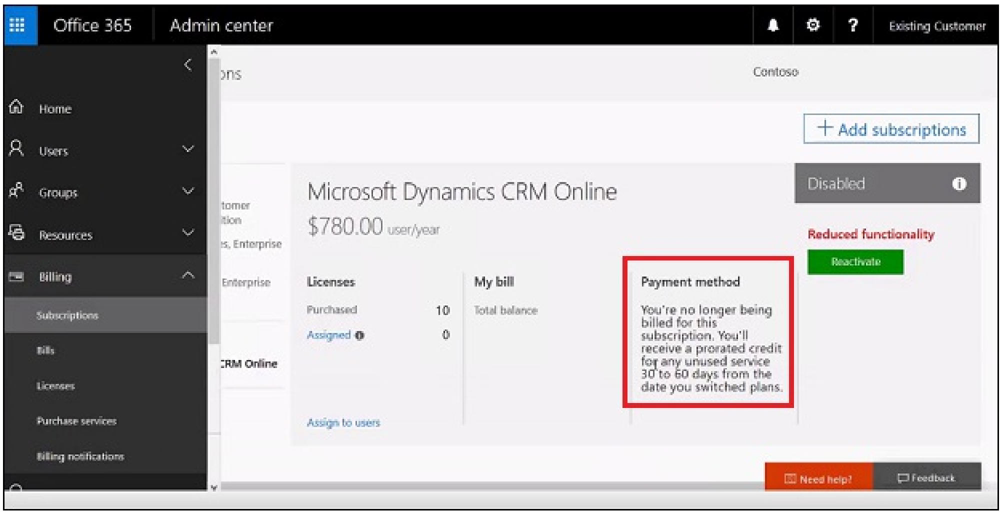
1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Choose **Billing** > **Subscriptions** and select your **Dynamics CRM Online** subscription.
3. On the right-hand side of the page, click **More actions** > **Cancel subscription**.




4. Fill in the information on the Cancel subscription page, and the click **Cancel subscription**.

When you check your Dynamics CRM Online subscription (**Billing** > **Subscriptions**), you'll see the following regarding your cancelled subscription:

- You're no longer being billed for the subscription.
- You'll receive a prorated credit for any unused service 30 to 60 days from the date you switched plans.
- The subscription is disabled with reduced functionality.




# What happens to my data when I switch to a Dynamics 365

## subscription?

Your data, user records, customization, etc. are stored in your tenant and are not tied directly to a specific CRM Online subscription. When you switch to a Dynamics 365 subscription, the new licenses provide access to your existing CRM organization and will not lead to any loss of data.

## What happens if I do not switch to a Dynamics 365 subscription?

If you do not switch to a Dynamics 365 subscription before the term end date, the CRM Online subscription will enter into an expired state for 90 days for most subscriptions, in most countries and regions. At the end of the expired state, the subscription moves into the disabled state, which is 90 days for most subscriptions, in most countries and regions. We recommend that you back up your data before the subscription is disabled, but as an admin, you can still access and back up data for your organization while it is in the disabled state. Any customer data that you leave behind may be deleted after 90 days, and will be deleted no later than 180 days after cancellation.

Here's what to expect for you and your users if your subscription is disabled.

- **Admin access**: Admins can still sign in and access the Office 365 Admin Center, and buy other Office 365 subscriptions as needed. As a global or billing admin, you have 90 days to reactivate the subscription with all data intact.
- **User access**: Your users won't be able to use Office 365 services like OneDrive for Business, or access customer data—for example, email or documents on team sites. Office applications, like Word and Excel, will eventually move into a read-only, reduced functionality mode and display Unlicensed Product notifications.

## Need help? Contact support.

As an admin for Dynamics 365, you get free access to our knowledgeable support agents for pre-sales, account, and billing support, as well as for help resolving technical issues. You can also contact support on behalf of Dynamics 365 users in your organization. See Billing and subscription support.

**See also**

Important information for CRM Online customers
Switch to a different Office 365 for business plan
Onboard your organization and users to Dynamics 365 (online)
Purchase and assign Dynamics 365 (online) licenses
Assign or remove licenses for Office 365 for business Terminology used in the product and documentation

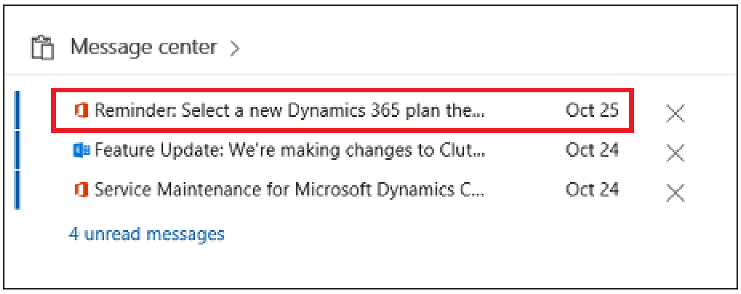
# Important information for CRM Online customers

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Microsoft is introducing Dynamics 365, the next generation of intelligent business applications that enable your organization to grow, evolve, and transform to meet the needs of your customers and capture new opportunities. As a result, Microsoft introduced new plans for customers November 1, 2016, that are similar, but not identical to your current plan.

The existing Dynamics CRM Online plan will be retired effective November 1, 2016. However, if you have a current subscription, this change won't affect you right away. As a global administrator, you'll receive email updates and see posts in the message center (part of the Office 365 Admin Center) with information on when you need to take action.




**Additional resources**

- Dynamics 365 Licensing Guide
- Dynamics 365 pricing
- Existing Customer License Transition Guide
- Business apps in Dynamics 365
- Video: Get familiar with Dynamics 365 (for admins)
- Onboard your organization and users to Dynamics 365 (online)

When you are ready to move to a new plan—either now or during renewal—you'll have options to choose from.

## Compare your options for upgrading or switching plans

You can choose to maintain similar functionality you have with CRM Online or take advantage of new features and functionality from Dynamics 365. The licensing changes are as follows.

| EXISTING CRM ONLINE LICENSE | RECOMMENDED DYNAMICS 365 LICENSE |
| --- | --- |
| Enterprise | Dynamics 365 Customer Engagement Plan |
| Professional | Dynamics 365 Customer Engagement Plan, Dynamics 365 for Sales, or Dynamics 365 for Customer Service |

| EXISTING CRM ONLINE LICENSE | RECOMMENDED DYNAMICS 365 LICENSE |
|---|---|
| Basic | Dynamics 365 for Team Members, Dynamics 365 for Sales, Dynamics 365 for Customer Service, or Dynamics 365 Customer Engagement Plan |
| Essential | Dynamics 365 for Team Members |
| Field Service Add-on | Dynamics 365 Customer Engagement Plan, or Dynamics 365 for Field Service |
| Project Service Automation Add-on | Dynamics 365 Customer Engagement Plan, or Dynamics 365 for Project Service Automation |

**IMPORTANT**

Existing customers must choose which Dynamics 365 licenses meet the needs of their organization. Simply transitioning existing licenses to the Dynamics 365 equivalent may not always be the best course of action. Review the use rights below to determine the mix of user subscriptions that are suitable for your organization's needs. Based on the use rights changes with the launch of Dynamics 365, this may be different than what you have today. Review the following information for assistance on how to make your best license choices.

#### Option 1: For Enterprise, Professional, Field Service, Project Service Automation, or Basic Users, consider Dynamics 365 Customer Engagement Plan

This option is ideal if you want to take advantage of functionality in multiple Dynamics 365 applications, or the new functionality that Dynamics 365 Customer Engagement Plan has to offer. Dynamics 365 Customer Engagement Plan includes Customer Service, Sales, Project Service Automation, Field Service, and PowerApps.

#### Option 2: For Professional Users, consider Dynamics 365 for Customer Service

Choose this option if you want to maintain access to the Customer Service functionality you have today in CRM Online. The Customer Service Application is intended for users who will be engaging in any kind of customer service role, from basic call centers to more advanced support scenarios, focused on case management. This license includes all core Customer Service functionality – Case Management, Unified Service Desk and scripts, and SLAs and Entitlements management, plus embedded PowerApps, Social Engagement, Gamification, Mobile Offline, and Voice of Customer.

#### Option 3: For Professional Users, consider Dynamics 365 for Sales

Choose this option if you want to maintain access to the Sales functionality you have today in CRM Online. The Sales Application is intended for users who will be engaging in field sales, inside sales, sales management, partner sales, or any other full sales role. This license includes all core sales functionality – Opportunity & Lead Management, Product & Price Lists management, competitor tracking, Quote/Order/Invoice, lightweight marketing capabilities, and Unified Service Desk. This also includes the functionality needed to manage Sales performance plus embedded PowerApps, Social Engagement, Gamification, Mobile Offline, and Voice of Customer.

#### Option 4: For Basic Users, consider Dynamics 365 for Customer Service

Choose this option if you want to maintain access to full Customer Service functionality and require write access to Cases. This will get you access to what you have today in CRM Online (minus write access to leads), plus embedded PowerApps, Social Engagement, Gamification, Mobile Offline, and Voice of Customer.

#### Option 5: For Basic Users, consider Dynamics 365 for Sales

Choose this option if you want to maintain access to full Sales functionality and require write access to Cases or Leads. This will get you access to what you have today in CRM Online (minus write access to cases), plus

PowerApps, Social Engagement, Gamification, Mobile Offline, and Voice of Customer.

**Option 6: For Basic Users, consider Dynamics 365 for Team Members**

Choose this option if you do not need access to full functionality and do not require write access to Leads. This will get you access to what you have today in CRM Online (minus leads) plus embedded PowerApps.

**Option 7: For Essential Users, consider Dynamics 365 for Team Members**

Choose this option to get access to what you have today in CRM Online plus embedded PowerApps.

**Option 8: For Project Service Automation Users, consider Dynamics 365 for Project Service Automation or Dynamics 365 Customer Engagement Plan**

Choose this option if you purchased a Basic User plus Project Service Automation plan. Project Service Automation includes all of the functionality of the Project Service Automation add-on, plus PowerApps, Social Engagement, Gamification, Mobile Offline, Project Online Premium, and Voice of Customer. This would not include write access to cases or leads – for this access the Project Service Automation user should license Dynamics 365 Customer Engagement Plan.

**Option 9: For Field Service Users, consider Dynamics 365 for Field Service or Dynamics 365 Customer Engagement Plan**

Choose this option if you purchased a Basic User plus Field Service plan. Field Service is intended for users who will be engaging in any kind of field technician, scheduler, or dispatcher role. This license includes all of the functionality of the Field Service add-on, plus PowerApps, Social Engagement, Gamification, Mobile Offline, Project Online Premium, and Voice of Customer. This would not include write access to cases or leads – for this access the Project Service Automation user should license Dynamics 365 Customer Engagement Plan.

## How to upgrade to Dynamics 365 Customer Engagement Plan or switch to a Dynamics 365 Application

You can switch to Dynamics 365 now, or wait until it’s time to renew, and then upgrade during the renewal process. Either way, you’ll work with your account representative or partner to make the switch, unless you bought your subscription directly from Microsoft, in which case you can switch in the Office 365 Admin Center. To learn more, see Switch from Dynamics CRM Online to Dynamics 365 (online).

**See also**

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Important information for CRM Online volume license customers

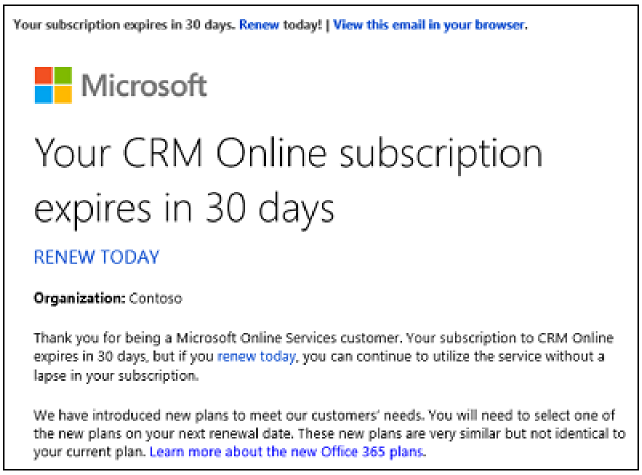
8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Your Dynamics CRM Online plan is being retired. When it's time to renew, you will need to renew using one of the Dynamics 365 plans. To learn more about your options, see Important information for CRM Online customers.

If you're an existing Dynamics CRM Online customer, you will be notified when your subscription will expire. At that time, you'll need to start a new subscription with one of the new Dynamics 365 (online) licenses. You can switch before you receive the expiration notice.

> **IMPORTANT**
> It is important that you switch your users from CRM Online licenses to Dynamics 365 licenses in order to avoid any service disruption.




## Reassign user licenses

You can use the Office 365 Admin Center to reassign licenses for up to 20 users at a time.

> **TIP**
> If you have a lot of users, you can optionally use Remote PowerShell to assign user licenses. To learn how, see Use Office 365 PowerShell to assign licenses to user accounts.

1. In the admin center, choose **Users** > **Active users**.
2. Select the boxes next to the names of the users that you want to move to the Dynamics 365 subscriptions.
3. In the **Bulk actions**-pane, choose **Edit product licenses**.
4. Select **Replace existing product license assignments** > **Next**.
5. Toggle the switches to **Off** to remove a license and **On** to add a license to users.

6. When you’re done, choose **Replace** > **Close**.

## What happens to my data when I switch to a Dynamics 365 subscription?

Your data, user records, customization, etc., are stored in your tenant and are not tied directly to a specific CRM Online subscription. When you switch to a Dynamics 365 subscription, the new licenses provide access to your existing CRM organization and will not lead to any loss of data.

## What happens if I do not switch my users to Dynamics 365 licenses?

If you do not switch your users to a Dynamics 365 subscription before the term end date, the CRM Online subscription will enter into an expired state for 90 days for most subscriptions, in most countries and regions. At the end of the expired state, the subscription moves into the disabled state, which is 90 days for most subscriptions, in most countries and regions.

Here's what to expect for you and your users if your subscription is disabled.

- Admin access: Admins can still sign in and access the Office 365 admin center, and buy other Microsoft Online Services as needed.
- User access: Your users won't be able to use Dynamics 365, or access customer data. CRM Online applications will eventually move into a read-only, reduced functionality mode and display Unlicensed Product notifications.

**See also**

Important information for CRM Online customers Switch from Dynamics CRM Online to Dynamics 365 (online)
Support and billing

# Promo codes: Non-profit Web Direct

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. In the table below, locate your existing CRM Online plan and determine the promo code for the plan that best fits your business.

| EXISTING DYNAMICS CRM ONLINE USER | APPLICATION TRANSITION PRICING | PROMO CODE | COMMENT |
|---|---|---|---|
| Professional User Subscription License (USL) | $86 (for Dynamics 365 Customer Engagement Plan) | Dyn365PLAN1NFP | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL | $76 (for Sales or Customer Service) | Dyn365PRONFP | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $66 (for Dynamics 365 Customer Engagement Plan) | Dyn365O365PLAN1NFP | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $59 (for Sales or Customer Service) | Dyn365O365NFP | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL + Field Service or Project Service Automation Add-on | $76 (for Field Service or Project Service) | Dyn365PRONFP | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL | $57 (for Dynamics 365 Customer Engagement Plan) | Dyn365BASPLAN1NFP | Only applies for existing users as of October 31, 2016 |
| Basic USL | $50 (for Sales or Customer Service) | Dyn365BASICNFP | Only applies for existing users as of October 31, 2016 |

**See also**

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Promo codes: Student Web Direct

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. In the table below, locate your existing CRM Online plan and determine the promo code for the plan that best fits your business.

| EXISTING DYNAMICS CRM ONLINE USER | APPLICATION TRANSITION PRICING | PROMO CODE | COMMENT |
|---|---|---|---|
| Professional User Subscription License (USL) | $86 (for Dynamics 365 Customer Engagement Plan) | Dyn365PLAN1EduStu | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL | $76 (for Sales or Customer Service) | Dyn365PROEduStu | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $66 (for Dynamics 365 Customer Engagement Plan) | Dyn365O365PLAN1 EduStu | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $59 (for Sales or Customer Service) | Dyn365O365EduStu | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL + Field Service or Project Service Automation Add-on | $76 (for Field Service or Project Service) | Dyn365PROEduStu | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL | $57 (for Dynamics 365 Customer Engagement Plan) | Dyn365BASPLAN1EduStu | Only applies for existing users as of October 31, 2016 |
| Basic USL | $50 (for Sales or Customer Service) | Dyn365BASICEduStu | Only applies for existing users as of October 31, 2016 |

### See also

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Promo codes: Faculty Web Direct

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. In the table below, locate your existing CRM Online plan and determine the promo code for the plan that best fits your business.

| EXISTING DYNAMICS CRM ONLINE USER | APPLICATION TRANSITION PRICING | PROMO CODE | COMMENT |
|---|---|---|---|
| Professional User Subscription License (USL) | $86 (for Dynamics 365 Customer Engagement Plan) | Dyn365PLAN1EduFac | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL | $76 (for Sales or Customer Service) | Dyn365PROEduFac | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $66 (for Dynamics 365 Customer Engagement Plan) | Dyn365O365PLAN1EduFac | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $59 (for Sales or Customer Service) | Dyn365O365EduFac | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL + Field Service or Project Service Automation Add-on | $76 (for Field Service or Project Service) | Dyn365PROEduFac | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL | $57 (for Dynamics 365 Customer Engagement Plan) | Dyn365BASPLAN1EduFac | Only applies for existing users as of October 31, 2016 |
| Basic USL | $50 (for Sales or Customer Service) | Dyn365BASICEduFac | Only applies for existing users as of October 31, 2016 |

## See also

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Promo codes: Government Web Direct

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. In the table below, locate your existing CRM Online plan and determine the promo code for the plan that best fits your business.

| EXISTING DYNAMICS CRM ONLINE USER | APPLICATION TRANSITION PRICING | PROMO CODE | COMMENT |
|---|---|---|---|
| Professional User Subscription License (USL) | $86 (for Dynamics 365 Customer Engagement Plan) | Dyn365PLAN1Gov | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL | $76 (for Sales or Customer Service) | Dyn365PROGov | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $66 (for Dynamics 365 Customer Engagement Plan) | Dyn365O365PLAN1Gov | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $59 (for Sales or Customer Service) | Dyn365O365Gov | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL + Field Service or Project Service Automation Add-on | $76 (for Field Service or Project Service) | Dyn365PROGov | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL | $57 (for Dynamics 365 Customer Engagement Plan) | Dyn365BASPLAN1Gov | Only applies for existing users as of October 31, 2016 |
| Basic USL | $50 (for Sales or Customer Service) | Dyn365BASICGov | Only applies for existing users as of October 31, 2016 |

**See also**

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Promo codes: Commercial Web Direct

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For current CRM Online customers, we are offering discounted pricing on Dynamics 365 plans when you transition. In the table below, locate your existing CRM Online plan and determine the promo code for the plan that best fits your business.

| EXISTING DYNAMICS CRM ONLINE USER | APPLICATION TRANSITION PRICING | PROMO CODE | COMMENT |
|---|---|---|---|
| Professional User Subscription License (USL) | $86 (for Dynamics 365 Customer Engagement Plan) | Dyn365PLAN1 | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL | $76 (for Sales or Customer Service) | Dyn365PRO | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $66 (for Dynamics 365 Customer Engagement Plan) | Dyn365O365PLAN1 | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Professional USL Add-on to O365 | $59 (for Sales or Customer Service) | Dyn365O365 | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL + Field Service or Project Service Automation Add-on | $76 (for Field Service or Project Service) | Dyn365PRO | For customers as of October 31, 2016 this offer applies to all user licenses purchased before and after October 31, 2016 until renewal. |
| Basic USL | $57 (for Dynamics 365 Customer Engagement Plan) | Dyn365BASPLAN1 | Only applies for existing users as of October 31, 2016 |
| Basic USL | $50 (for Sales or Customer Service) | Dyn365BASIC | Only applies for existing users as of October 31, 2016 |

**See also**

Switch from Dynamics CRM Online to Dynamics 365 (online)

# Support and billing

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section provides information to address support and billing questions.

# Contact Technical Support

2 minutes to read

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This content has moved to: Get Help + Support

# Help and additional resources

10/8/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

There are several resources available to you covering planning, operating, and using Dynamics 365 (online).

> **NOTE**
> To contact technical support, see:
>
> - Enter a support request through the new support center

## Help for administrators

The following are useful resources for administering Dynamics 365 (online):

- Administer Dynamics 365 Customer Engagement
- What's new in Dynamics 365

## More self-service help resources

- View the Office 365 Service Health Dashboard
- Search the Support Blog and Community Forum
- Search the Microsoft Knowledge Base

## Security and service continuity

When a business allows an external service provider to store and manage its data, key considerations must include security, data protection, privacy, and data ownership. Microsoft takes these concerns seriously and has applied its years of cloud and on-premises experience with security and privacy to delivery of the Dynamics 365 (online) service. This focus is highlighted by the 99.9% uptime provision of the service-level agreement (SLA).

## Microsoft Dynamics 365 (online) Trust Center

The Microsoft Dynamics 365 (online) Trust Center describes the trust principles concerning security, privacy, service transparency, and compliance in Dynamics 365 (online).

## Support and service status

**Office 365 admin portal**

The Office 365 admin portal provides tools and resources that can assist you with key Office 365 online service information and tasks such as:

How do I check my online service health?

Use the Organization Insights solution to view metrics about your instance

**See also**

Contact Technical Support

# Volume licensing FAQ

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

As of the December 2016 Update for Dynamics 365 (online), Dynamics CRM functionality is now included as a part of Dynamics 365, a suite of intelligent business applications. Dynamic 365 unifies customer relationship management (CRM) and enterprise resource planning (ERP) capabilities by delivering new applications to help manage specific business functions.

**Do you offer volume discounts to businesses?**

Yes. Discounts are available for Microsoft Dynamics enterprise agreement customers (typically 250+ licenses) who want to purchase through volume licensing. A Microsoft expert can help you explore the purchasing options for large enterprises and help you determine which is best for you. More information: Enterprise Agreements

**Which volume licensing programs apply to Dynamics 365 (online) Customer Engagement?**

Dynamics 365 (online) Customer Engagement is available through the Enterprise Agreement, Enterprise Subscription Agreement, and Campus and School Agreement volume licensing programs. The agreement you select will be on the same billing and contract schedule as any existing volume licensing agreements that you might have.

**Can I move existing licenses from a direct purchase subscription to an enterprise agreement?**

Yes. If you who purchased Dynamics 365 (online) with a credit card or through invoicing, you can move to an enterprise agreement by following these steps:

1. Place an order through a Microsoft Licensing Solutions Partner for Dynamics 365 (online) licenses.

   > **IMPORTANT**
   >
   > It is important to order (at minimum) the same number of licenses and add-ons that you currently have to ensure that you do not lose data. For example, if you have 50 Professional licenses, 3 additional production instances, and 5 GB of storage, be sure to order the same number of licenses and add-ons (or more).

2. Once the order has been invoiced, the Online Service Manager (OSM) identified on the enterprise agreement will receive an activation email, which allows the OSM to sign in to the existing Dynamics 365 (online) account and associate the new licenses to it. The new order will pool with your existing licenses, but does not cancel the direct purchase subscription.

   > **NOTE**
   >
   > If the purchase was made on an enterprise agreement that already includes Microsoft Online Services licenses, for example Office 365 or Intune, then the Dynamics 365 (online) licenses will automatically attach to that Microsoft Online Services account and cannot be associated to your existing Dynamics 365 (online) account. If the licenses need to be separated, this requires a special amendment from your Microsoft Licensing Sales Specialist.

3. To cancel the direct purchase subscription, open a Service Request through the Admin Portal to contact Billing Support and inform them that you have purchased a license through volume licensing and request them to cancel the direct purchase subscription. This step is required in order to discontinue the credit card or invoice billing.

**How can I have the activation email resent?**

The activation email is sent to the Online Services Manager (OSM), who is a participant identified on the enterprise agreement. If the activation email needs to be resent, call Billing Support to make the request. Please be prepared to provide company information to verify personally identifiable information (PII).

> **WARNING**
>
> The activation email can only be resent to the OSM. If the OSM is unavailable and the email needs to be sent to a different contact, please contact your Microsoft Licensing Solutions Partner to request that the OSM information be changed. Once the information is changed, you will need to make a new request to Billing Support to resend the activation email to the new OSM.

**How do I add more licenses or add-ons, such as additional instances or storage when I have purchased through volume licensing?**

Dynamics 365 (online) customers that purchased their subscription through volume licensing have two options to add more licenses or purchase add-ons:

- Add them through the Volume Licensing Service Center using the License Reservation feature, which allows you to immediately add licenses or add-ons and then pay for them at the agreement anniversary time. Licenses are accessible within hours.
- Place an order through the standard Purchase Order process through the Microsoft Licensing Solutions Partner. Licenses are accessible in up to 12 hours after the order is processed by Microsoft.

**If I accidentally attach the volume licensing licenses by signing in to the wrong account, how can I move the licenses to the correct account?**

To reassign the account to which your volume licensing agreement licenses are attached, contact Billing Support and request to have your agreement remapped to a new account.

> **NOTE**
>
> The licenses cannot be remapped to a different account if you already own Microsoft Online Services licenses (Office 365 or Intune) on the same agreement, because all Microsoft Online Services licenses are attached to the same account.

**Where do I find support for my Dynamics 365 (online) volume licensing invoice?**

For assistance with a volume licensing invoice, contact your Microsoft Licensing Solutions Partner.

**See also**

Enterprise Agreements
Frequently Asked Questions About Product Licensing

# Billing FAQs for Dynamics 365 (online) Customer Engagement

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Billing support agents for Dynamics 365 often hear similar questions from our customers. To help answer your billing and subscription management questions as quickly as possible, we've put together this list of the most frequently asked questions.

## How do I find the correct Dynamics 365 (online) billing and subscription support team?

Before contacting Dynamics 365 (online) services billing support, you'll need to determine which platform your Dynamics 365 (online) account is hosted on because each platform has its own billing and subscription management support team. The simplest way to do this is to match your Dynamics 365 (online) account sign-in to one of the formats listed here:

**Microsoft online services platform**

If you sign in to your Dynamics 365 (online) account with a user name that follows this format, `email@contoso.onmicrosoft.com`, you're on the Microsoft Online Services environment. To find a contact in billing and subscription support, you can:

- Find your local Dynamics 365 (online) billing support number.

**Microsoft commerce transaction platform**

If you sign in to your Dynamics 365 (online) account with a user name that follows this format, `email@live.com`, you're on the Microsoft commerce transaction platform. To find a contact in billing and subscription support, you can submit a query to CRMAOC@microsoft.com.

## What billing activities do I need to contact Dynamics 365 (online) Billing Support to manage?

The instructions in this section apply equally to subscriptions purchased for Dynamics 365 (online), Microsoft Social Engagement, as well as Office 365.

You can resolve many billing-related issues by yourself, but there are some requests that only billing support can resolve. Please refer to the Billing support page if you want to do any of the following:

1. Make a change to billing frequency.
2. Make a change to payment method, that is, change from invoicing to credit card payments outside of subscription renewal. If you want to change your payment method during subscription renewal, see the next question for more information.
3. Reactivate an expired account.
4. Cancel a subscription or reduce the number of seats on a subscription. This can also be managed in the Office 365 admin portal, without having to contact Support.

5. Dispute a charge or clarify a subscription discrepancy.

6. Request a service level agreement (SLA) billing credit.

7. Correct or change a Partner of Record attachment. This can also now be self-managed through the Office 365 admin portal.

## When I renew my subscription, can I change my payment method?

During subscription renewal, you can move from credit card to invoice payment, but not from invoice to credit card. Please refer to the **Dynamics 365 (online)** tab on the Billing support page if you wish to change from invoice to credit card payments at subscription renewal time.

## How do I purchase Dynamics 365 (online) through Volume Licensing?

If you're interested in placing an order for Dynamics 365 (online) through Volume Licensing, you can find more information on what the best option is for you by reviewing How Volume Licensing Works. For detailed information, see Microsoft Volume Licensing Service Center.

## How do I extend my Dynamics 365 (online) trial?

You can now extend your free trial on a self-serve extension on the Admin portal for a one-time extension of 30 days. Alternatively, you can submit a service request via the portal or call the Billing Support toll free numbers. Please note that for self-serve extensions you're required to enter your credit card information, but your credit card won't be charged for trial extensions.

## How do I migrate from Dynamics 365 (online) to the on-premises version of Dynamics 365?

If your organization is considering changing from Dynamics 365 (online) to the on-premises (server-based) version of Dynamics 365, you will need to work with Technical support.

## How do I cancel my Dynamics 365 (online) subscription?

The instructions in this section apply to subscriptions made through Dynamics 365 (online) as well as through Office 365.

You'll need to contact billing support to cancel your subscription. To contact billing support, please refer to the Billing support page.

Before you call, have the following information ready:

1. Billing administrator's Microsoft account and password.

2. Organization URL and name.

3. The day that you want your subscription to Dynamics 365 (online) terminated.

You should have also made the following decisions:

1. Do you want to keep your existing data? If so, you can export it to Office Excel. For more information, see Export Data to Excel.

2. Do you want to keep any Internet Marketing service campaigns running? If you're not the person who signed up for the marketing service, you must work with that person to cancel or maintain it.

In addition, you can now do a self-serve cancellation of your subscription from the Admin portal.

**IMPORTANT**

If you cancel today, this subscription will remain active until the end of the billing cycle.

## How do I reactivate my expired Dynamics 365 (online) account?

The instructions in this section apply to subscriptions made through Dynamics 365 (online) as well as through Office 365.

To reactivate an expired Dynamics 365 (online) account, you'll need to contact billing and subscription support. Please refer to the Billing support page.

If you saved your data to a Office Excel workbook before canceling your Dynamics 365 (online) account, you should be able to import the saved data.

## How do I apply for a credit due to a Dynamics 365 (online) service outage?

The instructions in this section are common for subscriptions made through Dynamics 365 (online) as well as through Office 365.

You may be eligible for a billing credit if your online service level falls below 99.9% availability. For complete details, including a critical list of exclusions, see the Dynamics 365 Service Level Agreement.

Submit a claim by contacting Billing support. To contact billing support, please refer to the Contact information for billing support page.

## How do I apply for non-profit pricing?

Please refer to the Non-profit pricing page for more information on how to apply.

## How to change the Bill to country/region

You need to create a new tenant and the desired bill-to-country/region and purchase the desired offer on the new tenant. You'll have to manually export data from the old tenant and import into the new tenant. Finally, you'll contact Billing Support to cancel your subscription. To contact billing support, please refer to the Billing support page. If you require assistance with migrating the data, contact Technical support.

**See also**

Billing support
Find your Dynamics 365 administrator or support person

# Contact information for billing support

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If you're using Dynamics 365 (online) through an Enterprise Agreement (EA) or Campus Agreement/School Agreement (CASA) and need to contact Microsoft with a billing question, see Contact support for business products - Admin Help.

> **IMPORTANT**
> For transition related questions, dial the number for your region and then select option 2.

# Troubleshoot problems

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

We're sorry you're having a problem with Dynamics 365. Use the following list of troubleshooting topics to quickly find information to solve your issue.

## Outlook and email integration

- Frequently asked questions about synchronizing records between Dynamics 365 and Outlook
- Troubleshooting and monitoring server-side synchronization
- Best practices and things to know about server-side synchronization
- Monitor email processing errors

## SharePoint integration

- Troubleshooting server-based authentication

## Mobile

- Troubleshooting and things to know about Dynamics 365 for phones and tablets

## Dynamics 365 (online)

- Troubleshoot sign-in problems
- How do I check my online service health?
- Help and additional resources for Dynamics 365 (online)
- Troubleshooting: Unblock URLs required for Dynamics 365 (online)

## Billing and licensing

- Billing support
- Billing FAQs for Dynamics 365 (online)
- Volume licensing FAQ for Dynamics 365 (online) Customer Engagement

## Security

- Troubleshooting: User needs read-write access to the Dynamics 365 organization

## Unified Service Desk

- Troubleshoot Unified Service Desk

## Other

- Troubleshoot problems with data not displaying in a report

# Requirements and supported configurations

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section describes requirements and supported configurations for Microsoft Dynamics 365.

# Microsoft Dynamics 365 (online) requirements

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 (online) gives you the following options to access Dynamics 365 data:

- Web browser. No need to install anything to run Dynamics 365 (online) from a computer running a supported web browser.
- Dynamics 365 App for Outlook. An Outlook add-in that provides you with a complete set of Dynamics 365 capabilities right within Office Outlook.
- Dynamics 365 for phones and Dynamics 365 for tablets. Lightweight applications that let you access Dynamics 365 data on almost any web browser running on a tablet, smartphone, or non-Windows computer.

## Web browser requirements

You use a common web browser, such as Internet Explorer, Mozilla Firefox, Google Chrome or Apple Safari to view, add, or edit information stored in your organization's Dynamics 365 (online) database. For more information about the supported web browsers and hardware requirements, see Web application requirements for Microsoft Dynamics 365.

## Mobile device requirements

Users can work in Dynamics 365 (online) by using a supported browser on a mobile device, or by using Dynamics 365 for phones. For more information about the mobile experience in Dynamics 365 (online), see Set up Dynamics 365 for phones and Dynamics 365 for tablets.

## Microsoft Office requirements

Dynamics 365 leverages the capabilities of on-premises versions of Microsoft Office or Office 365 and integrates with Office Word and Office Excel. For more information about the supported versions of Microsoft Office, see Supported versions of Office.

For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:

- Dynamics 365 pricing
- Dynamics 365 Licensing Guide

**See also**

Get started administering Microsoft Dynamics 365 (online)
Plan for Microsoft Dynamics 365 (online) Deployment and Administration

# Plan for deployment and administration

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Your Dynamics 365 (online) deployment will go more smoothly with some preliminary planning. The following table lists some of the items to consider before you start the actual deployment process.

| ITEM | DESCRIPTION | CONSIDERATIONS |
| --- | --- | --- |
| Environment discovery | A detailed description of your organization's environment in terms of number of users, groups or teams, and the number and type of business units or divisions. Identify current Dynamics 365 data that you would like to bring into Dynamics 365 (online), and your overall data storage requirements. Include a business requirements analysis that describes your organization's expectation or requirements for a service level agreement (SLA). An SLA is an agreement between two or more parties describing the deliverables, support, and communication that each party will provide to the other. Specify your policies related to security and privacy. | Is there enough overlap in customers and products across business units to be able to work in the same Dynamics 365 data? What type of security policy does the organization already have in place? Are there any special requirements in this area? Is there a plan for business growth that could affect the number of users of Dynamics 365 (online)?<br><br>Plan for enough time to do this discovery; information that comes out of this exercise can affect the way you implement the service. |
| Single sign-on | An authentication process that enables a user to access multiple systems or services through a single set of sign-on credentials. For example, implementing single sign-on for Dynamics 365 (online) in an organization's network environment means that after a user signs in to the network, that user does not have to enter credentials again when accessing Dynamics 365 (online). **Note:** For Office 365 subscribers, Dynamics 365 (online) instance must be in the same tenant as your Office 365 subscription. A user account in Active Directory can only sync with one tenant. | There are additional requirements to implement single sign-on, therefore, consider how important it is to your organization.<br><br>More information: Manage user account synchronization |

| ITEM | DESCRIPTION | CONSIDERATIONS |
|---|---|---|
| Integration with Office 365 applications | You can significantly enhance your company's online, collaborative experience by integrating Office 365 applications with your Dynamics 365 (online) subscription. This requires a separate purchase of an Office 365 subscription<br><br>You'll have the best integration experience if your Office 365 subscription and Dynamics 365 (online) instance are in the same tenant.<br><br>For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:- Dynamics 365 pricing<br>- Dynamics 365 Licensing Guide | More information: What is Office 365 and how does it relate to Dynamics 365 (online)? |
| Administrative roles in the Microsoft Online Services environment | A number of administrative roles are available to assign to users if you manage your subscription in the Microsoft Online Services environment. Administrative roles define administrative responsibilities related to subscription management activities, for example, billing administration, password administration, and user management administration. | Consider the available administrative roles and the needs of your environment to identify the roles you want to use and the users you will choose for each role. The global administrator role is the highest level role, having all the permissions to manage any part of the subscription process. We recommend that you assign this role to more than one person so that someone is always available to manage all aspects of the subscription. **Note:** Administrative roles cover all subscription management functions within the service. These aren't the same as the security roles that you assign to users in Dynamics 365 (online), which are required and govern access to resources in the Dynamics 365 (online) service. See "Security roles in Dynamics 365 (online)" in this table. |
| Security roles in Dynamics 365 (online) | Dynamics 365 (online) uses role-based security. The security role assigned to a user determines the tasks the user is permitted to perform and the data that the user is permitted to view. | Every user must be assigned at least one security role to access Dynamics 365 (online). **Note:** Security roles aren't the same as administrative roles in the Microsoft Online Services environment, which cover subscription management and related activities in the Office 365 admin portal. See: Administrative roles in the Microsoft Online Services environment in this table. |

| ITEM | DESCRIPTION | CONSIDERATIONS |
| --- | --- | --- |
| Importing data | Dynamics 365 (online) offers a wizard to help with importing Dynamics 365 data from other applications and services. | If you import data from other systems, consider the way you'll process the data to minimize errors. More information: Import data (all record types) |
| Product updates | Some Dynamics 365 (online) releases will include optional product updates that you can choose to enable. | Product updates may affect existing customizations in your Dynamics 365 (online) instance. Review the documentation associated with each product update before you enable it in a production environment. Additionally, some product updates, such as the sales and service process forms, can't be removed or easily reverted to the previous functionality. Therefore, you should give careful consideration before you enable a product update. More information: Manage product updates **Tip:** If you're unsure whether you want to enable a product update in a Dynamics 365 (online) instance used in production, sign up for a trial subscription to evaluate the new functionality. More information: Sign up for a free trial |

## See also

Manage your Microsoft Dynamics 365 (online) subscription
Microsoft Dynamics 365 (online) Requirements
Grant users access to Microsoft Dynamics 365 (online) as a Microsoft Online service

# Supported web browsers and mobile devices

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Users can access the Dynamics 365 Web application with the most recent versions of these popular browsers:

- Internet Explorer
- Microsoft Edge
- Firefox
- Chrome
- Safari

For more detailed information about supported browsers, see Web application requirements for Dynamics 365.

For a mobile device, such as an iPad or smartphone, the following apps are available:

- Dynamics 365 for iPad
- Dynamics 365 for Windows 8

For more detailed information about supported phones and tablets, see Microsoft Dynamics 365 mobile and tablet device support.

**NOTE**

- Users who try to view Dynamics 365 on an unsupported browser may be redirected to a mobile experience.
  - For Dynamics 365 (online), version 9.0 and later, users are redirected to the Unified Interface experience. For more information see Unified Interface Overview.
  - For versions earlier than Dynamics 365 (online), version 9.0, users are redirected to CRM for phones express. This is a basic service that has limited functionality, and isn't intended to serve as a substitute for the full feature set of Dynamics 365. We recommend that users choose a supported browser or a Dynamics 365 app specific to the device.
- If you have added content to forms or dashboards in an iFrame, you might have implemented security restrictions around certain actions in that content, such as external links. Keep in mind that in Firefox, this security restriction code will likely be unsupported.

## Known issues when you run Microsoft Dynamics 365 with certain web browsers

This section describes the known issues when you run Dynamics 365 in a web browser.

#### Limited copy and paste support in Firefox and Chrome

Copy and paste functionality by using the clipboard is not yet fully supported on the Firefox and Chrome web browsers; the **Copy a Link** button at the top of the page may not function as expected.

#### You receive an error opening an Excel worksheet when you use Safari

If you export an Office Excel worksheet as a Dynamic Worksheet while using Safari, you may receive an error when trying to open the file. To remedy this, right-click the file, click **Get Info**, and, under **Open With**, select Excel.

**See Also**

Key preparation and configuration tasks Supported web browsers and mobile devices - earlier versions

# Web application requirements

9/8/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section lists the hardware and software requirements for the Dynamics 365 (on-premises) and Dynamics 365 (online) web and mobile device client applications.

## Dynamics 365 web application hardware requirements

The following table lists the minimum and recommended hardware requirements for the Dynamics 365 web application.

| COMPONENT | MINIMUM | RECOMMENDED |
| --- | --- | --- |
| Processor | 1.9 gigahertz (GHz) x86- or x64-bit dual core processor with SSE2 instruction set | 3.3 gigahertz (GHz) or faster 64-bit dual core processor with SSE2 instruction set |
| Memory | 2-GB RAM | 4-GB RAM or more |
| Display | Super VGA with a resolution of 1024 x 768 | Super VGA with a resolution of 1024 x 768 |

Running Dynamics 365 on a computer that has less than the recommended requirements may result in inadequate performance. Additionally, satisfactory performance may be experienced running systems that use a different hardware configuration than those published here—for example, a system with a modern quad-core processor, lower clock speed, and more RAM.

**Network requirements**

Dynamics 365 is designed to work best over networks that have the following elements:

- Bandwidth greater than 50 KBps (400 kbps)
- Latency under 150 ms

Notice that these values are recommendations and don't guarantee satisfactory performance. The recommended values are based on systems using out-of-the box forms that aren't customized. If you significantly customize the out-of-box forms, we recommend that you test the form response to understand bandwidth needs. More information: Verify network capacity and throughput for Dynamics 365 clients

**Network requirements when you use Dynamics 365 interactive service hub experience**

The Dynamics 365 interactive service hub experience is designed to work best over networks that have the following elements:

- Bandwidth greater than 1 Megabit per second (125 KBps/Kilobyte per second)
- Latency under 150 ms

Notice that the suggested network requirements include the metadata download needed for first run or newly published customizations. The Dynamics 365 interactive service hub typically requires more bandwidth when metadata has to be downloaded. These values are recommendations and don't guarantee satisfactory performance. The values are based on systems using uncustomized, out-of-the box forms. If you significantly customize the out-of-box forms, we recommend that you test the form response to understand bandwidth needs.

## Supported versions of Internet Explorer and Microsoft Edge

The following table describes the Windows and Internet Explorer or Microsoft Edge versions supported for use with the Dynamics 365 web application.

| WINDOWS VERSION | INTERNET EXPLORER 10 | INTERNET EXPLORER 11[3] | MICROSOFT EDGE |
|---|---|---|---|
| Windows 10 | Not supported[1] | Supported | Supported |
| Windows 8.1 | Not supported[1] | Supported | Not supported |
| Windows 8 | Limited support[2] | Not supported[1] | Not supported |
| Windows 7 | Limited support[2] | Supported | Not supported |

[1] This version of Windows doesn't support the version of Internet Explorer. More information: Internet Explorer 11 – FAQ for IT Pros
[2] Supported with the classic web application. Not supported with Unified Interface apps.
[3] Check requirements for individual apps, such as Customer Service Hub application requirements.

> **IMPORTANT**
>
> Although you may be able to use Internet Explorer 8, Internet Explorer 9, or an Internet Explorer and Windows combination that is not supported in the previous table, those web browsers are not recommended and are not supported with this version of Dynamics 365.
>
> Using plug-ins or other third-party extensions in your browser can increase load times on pages with lists of data.

## Supported non-Internet Explorer web browsers

The Dynamics 365 web application can run in any of the following web browsers running on the specified operating systems:

- Mozilla Firefox (latest publicly-released version) running on Windows 10, Windows 8.1, Windows 8, or Windows 7
- Google Chrome
  - Google Chrome (latest publicly-released version) running on Windows 10, Windows 8.1, Windows 8, Windows 7, or Google Nexus tablet
  - Google Chrome (latest publicly-released version) running on Mac OS X 10.8 (Mountain Lion), 10.9 (Mavericks), or 10.10 (Yosemite)
- Apple Safari (latest publicly-released version) running on Mac OS X 10.8 (Mountain Lion), 10.9 (Mavericks), 10.10 (Yosemite), or Apple iPad

To find the latest release for these web browsers, visit the software manufacturer's website.

> **IMPORTANT**
>
> - Using plug-ins or other third-party extensions in your browser can increase load times on pages with lists of data.
> - Mozilla Firefox ESR (Extended Support Release) versions aren't supported.

## Supported versions of Office

To use Dynamics 365 with Microsoft Office integration features, such as Export to Excel and Mail Merge, you must have one of the following Microsoft Office versions on the computer that is running the Dynamics 365 web application:

- Office 365
- Office 2016
- Office 2013
- Office 2010

For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:

- Dynamics 365 pricing
- Dynamics 365 Licensing Guide

## Printing reports

The Reporting ServicesMicrosoft ActiveX control is required to print reports. If you try to print a report and the control isn't installed, you'll be prompted to install it. The installer package is named RSClientPrint.cab and can found on the SQL Server Reporting Services server at <drive>:\Program files\Microsoft SQL Server\<MSSQL>\Reporting Services\ReportServer\bin.

## Transport Layer Security (TLS) requirement

With the Dynamics 365 (online), version 9.0, web browsers and other client applications that only use Transport Layer Security (TLS) versions earlier than TLS 1.2 will be unable to connect to their Dynamics 365 (online) instances and the Dynamics 365 admin center.

For more information, see these blog posts:

- Updates coming to Dynamics 365 Customer Engagement connection security
- TLS 1.2 support at Microsoft

**See also**

Supported web browsers and mobile devices

# Support for devices

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

For information about Dynamics 365 support for mobile devices, see What's supported in the Phones and Tablets Administrator Guide.

# Manage subscriptions, licenses, and user accounts

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

As a Microsoft Online Services environment administrator, you manage the Dynamics 365 (online) subscription, including billing and payments, user licenses, accounts and registration. You do these tasks in the Office 365 admin center.

**See also**

Manage Microsoft Dynamics 365 (online) instances
Terminology used in the product and documentation

# Reset a user's password

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If a user loses a password, you can reset it. To reset a user's password, you must be a Microsoft Online Services environment global administrator, user management administrator, or password administrator.

For step-by-step instructions, see Reset a User's Password.

> **NOTE**
>
> The reset password is temporary. The user must change the temporary password at the next sign in. To help users meet the requirements for creating a new password in the Microsoft Online Services environment, see Set a user's password expiration policy.

### See also

Manage subscriptions, licenses, and user accounts

# Manage email notifications to admins

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The Dynamics 365 (online) service team regularly sends email notifications to the administrators in your Dynamics 365 organization. Now, with a simple approach of mailbox rules, you have complete control over who should receive these email communications. As an administrator, you can set up mailbox rules to automatically redirect email communications from Dynamics 365 (online) (crmoln@microsoft.com) to additional recipients that you choose. For example, you can add to the list of recipients:

- People outside of your Dynamics 365 organization, such as your partners.
- People inside and outside of your company.

  All redirected emails retain the original sender context, such as Dynamics 365 (online) (crmoln@microsoft.com).

  You can automatically redirect the email notifications in Exchange Server 2010 or later versions. You can also set up automatic email redirection in the following deployments:

- Microsoft Exchange Server on-premises deployment
- Office 365 – Exchange Online service
- Hybrid deployment: Exchange Server on-premises and Office 365 subscription with Exchange Online
- Email deployments other than Exchange

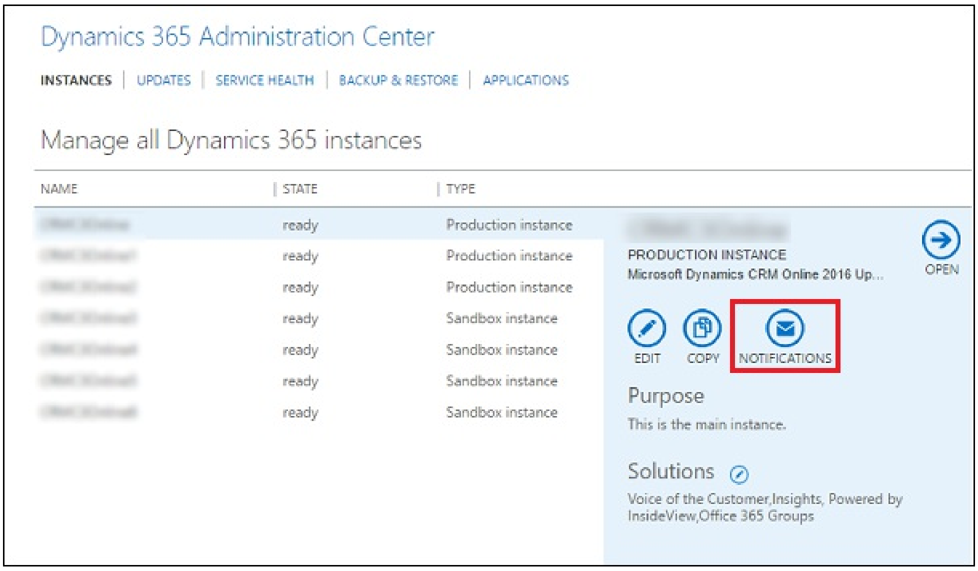
  If you have been added as an additional recipient, and you want to stop receiving email notifications, please contact your Dynamics 365 admin. If you're not sure who your Dynamics 365 admin is, see: Find your Dynamics 365 administrator or support person.

  For more information, download the white paper: Create your Mailbox rule

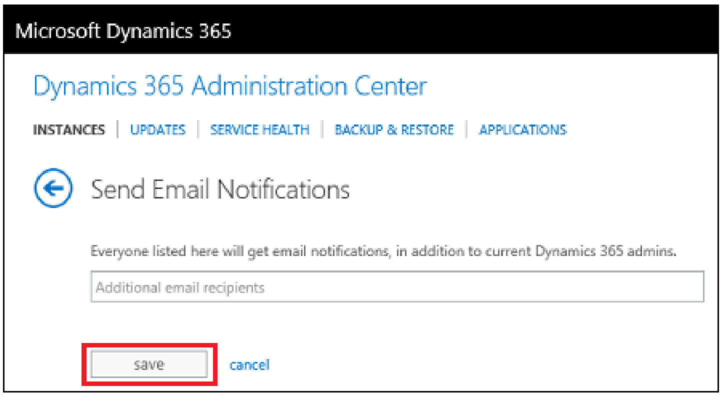
## Send email notifications to multiple recipients

By default, Dynamics 365 admins will receive update notifications. You can add others to receive update notifications.

1. Sign in to https://portal.office.com.
2. On the Office 365 menu bar, click **Admin centers** > **Dynamics 365** > **Instances** tab.
3. Choose an instance that has notifications you want to change.
4. Click **Notifications**.




5. Enter the email addresses of people to receive update notifications for the selected instance and click **Save**.




### See also

Blog: Managing Email notifications in Microsoft Dynamics CRM Online
Blog: Identifying Your Microsoft Dynamics CRM Online Administrator(s)

# Purchase and assign Dynamics 365 (online) licenses

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 introduces a new licensing model with choices that extend to pricing with Dynamics 365. Get monthly plans—with apps packaged for savings—or standalone applications. Opt for full or light use. And select the edition that meets the needs of your large or small business, now and down the road.

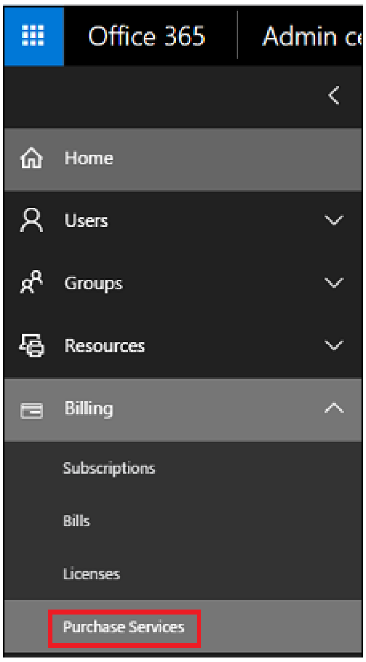
**TIP**
Get started with the following resources:

- Important information for CRM Online customers
- Download: Dynamics 365 Licensing Guide
- Video: How to buy Dynamics 365
- Dynamics 365 Pricing
- Download: Microsoft Dynamics 365 Licensing Guide

## Purchase a Dynamics 365 (online) license

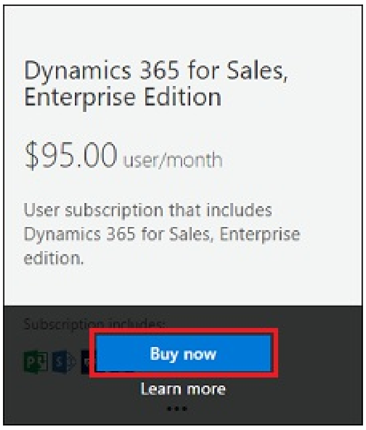
1. Browse to the Office 365 admin center and sign in as a global admin.

2. Click **Billing** > **Purchase Services**.



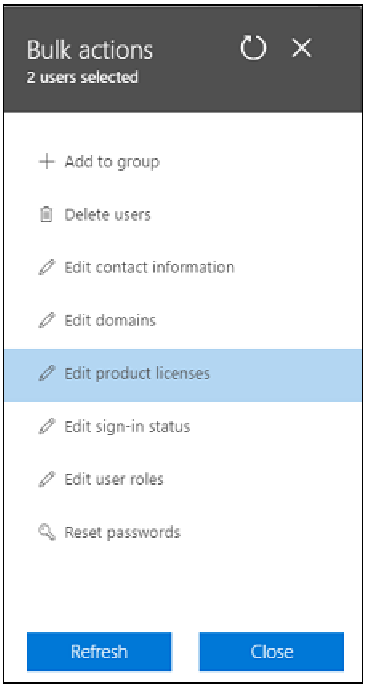

3. Select the subscription that best fits your company's Dynamics 365 needs.

4. Click **Buy now** and then follow the steps to purchase a new license.



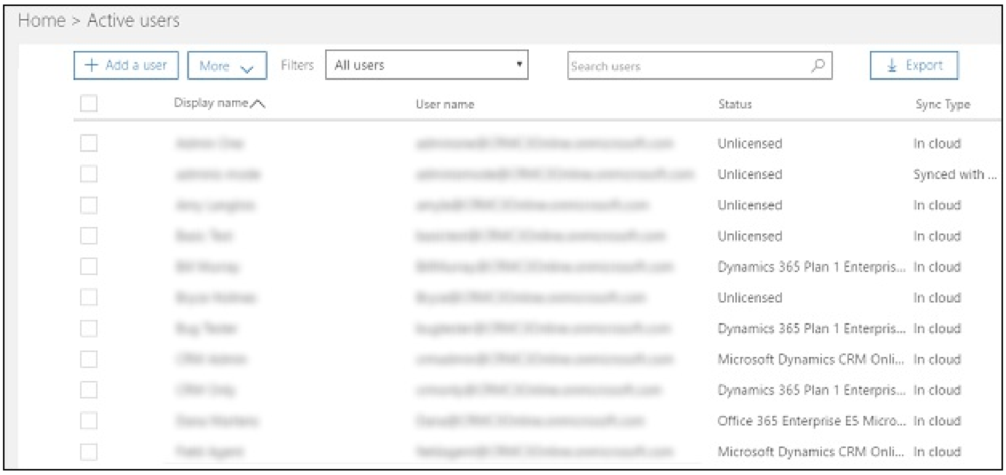

## Assign a license to a user

1. Browse to the Office 365 admin center and sign in as a global admin.
2. Click **Users** > **Active users**.
3. Select multiple users, and then click **Edit product licenses**.




4. Click **Replace existing product license assignments**, and then click **Next**.
5. Turn on the license for your Dynamics 365 plan.


6. Click **Replace**, and then click **Close** twice.
7. Review the license status on the Active users page and make other assignments as needed.




# PowerApps licensing

On March 21, 2018, we introduced PowerApps integration with Dynamics 365 for Customer Engagement. See the blogs PowerApps Spring Update and What's new in the Dynamics 365 admin center.

Dynamics 365 and PowerApps are now based on the same platform that powers Dynamics 365. PowerApps users appear as users in Dynamics 365 via **Settings** > **Security** > **Users**. What users can do and the security role assigned to them is scoped to PowerApps and Flow applications managed by environment administrators. See Configure environment security.

PowerApps users can be licensed in multiple ways. They can be assigned a license by a Global administrator of PowerApps, Flow or many of the Office 365 user licenses (almost all Office 365 user license types) that include PowerApps capabilities. PowerApps users can also be licensed via self-serve sign-up. See Manage licenses in my org.

> **TIP**
> You can use security groups to control which licensed users can be a member of a particular instance by assigning a security group to your Dynamics 365 (online) instances. See Control user access to instances: security groups and licenses.

### See also

Important information for CRM Online customers
Manage Microsoft Dynamics 365 (online) licenses
Manage subscriptions, licenses, and user accounts
Onboard your organization and users to Dynamics 365 (online)
Business apps in Dynamics 365

# Manage licenses

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

When you purchase a subscription to Dynamics 365 (online), you receive a set of licenses to assign to users. Only licensed users are allowed access to the online service. You must assign a license to every user who will use the service.

A license conflict occurs if your organization has more users than licenses.

> **TIP**
>
> Get started with the following resources:
>
> - Important information for CRM Online customers
> - Download: Dynamics 365 Licensing Guide

## Running out of Dynamics 365 (online) licenses?

If you are running out of licenses, you have several options:

- Add licenses to your subscription and then assign licenses to users.

  For step-by-step instructions for adding licenses to a subscription that is managed through Microsoft Online Services, see Manage licenses.

- Remove licenses from other users. This disables the user account in Dynamics 365 (online) and frees up the license so that you can re-assign it.

  For step-by-step instructions for removing a license that you manage through Microsoft Online Services, see Manage licenses.

- Remove a user account by deleting it. This disables the user account in Dynamics 365 (online) and frees up the license so that you can re-assign it.

  > **TIP**
  >
  > Delete the user accounts of people who leave your company. This frees up the licenses so that you can re-assign them.

  For step-by-step instructions about deleting a user account that you manage through Microsoft Online Services, see Delete or restore users.

- If a license conflict occurs because your credit card information has become outdated in Microsoft Online Services, you can renew your subscription by updating the credit card information, for example, by updating the card’s expiration date, or by adding a new credit card.

  For step-by-step instructions for updating credit card information, see Update your credit card information.

**IMPORTANT**

Signing out of the Office 365 Admin Center doesn't sign you out of Dynamics 365 (online). You must do that separately.

To cancel your subscription to Dynamics 365 (online) for any reason, call Billing Support at the phone number listed for your country or region here: Billing Support and Phone Numbers.

**NOTE**

If you don’t have access to a phone, you may submit your cancellation request as a service request. To enter the service request, sign in to your account, and then, under **Support**, click or tap **Service Requests**. In the **Problem Description** area, fill out the form for a new service request by choosing **Cancel subscription**.

**IMPORTANT**

Save your Dynamics 365 (online) data to a location where you can retrieve it later, if needed.

### See also

Important information for CRM Online customers
Manage subscriptions, licenses, and user accounts
Create users and assign Microsoft Dynamics 365 (online) security roles

# Manage user account synchronization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Because Dynamics 365 (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

You can choose from three main identity models in Office 365 when you set up and manage user accounts:

1. **Cloud identity**. Manage your user accounts in Office 365 only. No on-premises servers are required to manage users; it's all done in the cloud.
2. **Synchronized identity**. Synchronize on-premises directory objects with Office 365 and manage your users on-premises. You can also synchronize passwords so that the users have the same password on-premises and in the cloud, but they will have to sign in again to use Office 365.
3. **Federated identity**. Synchronize on-premises directory objects with Office 365 and manage your users on-premises. The users have the same password on-premises and in the cloud, and they do not have to sign in again to use Office 365. This is often referred to as single sign-on.

It's important to carefully consider which identity model to use to get up and running. Think about time, existing complexity, and cost. These factors are different for every organization. Your choice 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 Azure AD Connect?
- Office 365 integration with on-premises environments

## 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 Dynamics 365 (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*>
> - CAN: https://<*yourCRMorganizationname*>.crm3.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*>
> - IND: https://<*yourCRMorganizationname*>.crm8.dynamics.com?whr=<*yourFederationServiceIdentifier*>
> - United States of America Government: https://< *yourCRMorganizationname*>.crm9.dynamics.com?whr=<*yourFederationServiceIdentifier*>
> - UK: https://<*yourCRMorganizationname*>.crm11.dynamics.com?whr=<*yourFederationServiceIdentifier*>
> - DEU: https://<*yourCRMorganizationname*>.crm.microsoftdynamics.de?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 Dynamics 365 (online) users and encourage them to bookmark it.

# Grant users access

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To have users up and running in Dynamics 365 (online), you complete some administrative tasks in the Office 365 Admin Center—which you generally do only once—followed by administrative tasks in Dynamics 365 (online).

Dynamics 365 (online) is an online service subscription. When you signed up for this service, you received a set of licenses with your subscription, one license for each user. You can purchase additional licenses if you need them.

As described in step one that follows, in the Office 365 Admin Center, register your users so that they are recognized in the Microsoft Online Services environment, assign a license to each user, and then assign administrative roles to the users you choose to fill those roles. More information: Assigning admin roles

In Dynamics 365 (online), populate the service with your organization's data, including users and their security roles, business units, and any existing Dynamics 365 data that you want to import from other applications or services. If your organization uses business units, assign users to the appropriate business unit, and then assign a security role to each user. Dynamics 365 (online) includes predefined security roles that aggregate a set of user permissions to simplify user security management. An organization can define additional roles or edit predefined security roles to meet its unique security needs. For more information about security roles in Dynamics 365 (online), see Security roles and privileges.

> **IMPORTANT**
> Users can't access Dynamics 365 (online) until they've been assigned at least one security role. See Step Two: Assign security roles in Dynamics 365 (online).

## Differences between the Microsoft Online services environment administrative roles and Dynamics 365 (online) security roles

*Administrative roles* are available to assign to users in the Office 365 admin portal. The administrative roles cover a set of rights and permissions related to managing the service subscription, such as adding users and assigning licenses. The global administrator role has rights to control every aspect of the subscription and to add subscriptions to other online services. The password administrator role has rights to reset a user's password, create service requests, and monitor the service.

*Security roles* are assigned within Dynamics 365 (online) and cover rights and permissions-related aspects, for example, permission to update records or to publish customizations.

The roles are similar in that both types contain aggregated sets of permissions that allow access to some items and not to others, and that allow some actions to be taken but not others. The roles are different in that the first one applies to the management of the subscription but not to the service itself, and the second applies only within the service.

Using roles is a powerful way to group a set of rights that are common to a job title or business unit. This way, the administrator can grant a whole set of permissions to users simply by assigning a user or group of users to a given role.

## Step One: Provision users, and assign licenses and administrative roles in the Office 365 admin center

Your organization's subscription to Dynamics 365 (online) provides access to the Office 365 Admin Center through a global administrator account. The global administrator manages every aspect of the subscription and may add subscriptions to other Microsoft Online Services.

As the global administrator for your organization, one of your first tasks is to create users in the Office 365 Admin Center. This registers users in the system and enables users to be licensed to use services available within the online service environment. You decide which service you want your users to have by assigning a license for that service to a user. For instructions about creating users in the Microsoft Online Services environment, see Create or edit users in Office 365. For instructions about assigning a license to a user, see Assign or remove licenses, or view a list of unlicensed users.

During your planning phase, you might have identified a set of key administrative roles that you want to fill. More information: Plan for Microsoft Dynamics 365 (online) deployment and administration. Because the administrative roles provide coverage for administrative tasks when the global administrator is not available, it's a best practice to assign these roles to users, including assigning the global administrator role to a second user. More information: Assigning admin roles and Permissions in Office 365.

**The online service sends an invitation to each user**

After you set up a user in the Office 365 Admin Center, that user receives an email invitation with a link and a password for the Microsoft Online Services environment. The credentials in the invitation provide access to the portal and to documentation. However, the users who receive these invitations can't access Dynamics 365 (online) until you complete step two in this process.

## Step Two: Assign security roles in Dynamics 365 (online)

Sign in to Dynamics 365 (online) and add business units (if your organization needs more than one business unit), and assign security roles and business units to users. The users you registered with the online service in step one are automatically added to Dynamics 365 (online). After you assign at least one security role to a user, that user can click the link in the email invitation, enter credentials, and begin using Dynamics 365 (online). More information: Assign a security role to a user.

> **IMPORTANT**
> Before you start adding information to Dynamics 365 (online), we recommend that you turn off or disable your browser's pop-up blocker. Pop-up blockers can block data-entry dialog boxes in Dynamics 365 (online). For more information about browser and other settings for improved product performance, see Key preparation and configuration tasks.

You might have Dynamics 365 data located in other systems. In your planning phase, you considered how you'll import this data. Before you invite users into Dynamics 365 (online), ensure that you have completed the data migration process. More information: Import data (all record types).

**See also**

Get started administering Microsoft Dynamics 365 (online)
Plan for Microsoft Dynamics 365 (online) deployment and administration
Manage subscriptions, licenses, and user accounts
Import data (all record types)

# Restrict access with trusted IP rules

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can limit access to Dynamics 365 (online) to users with trusted IP addresses to reduce unauthorized access. When trusted IP address restrictions are set in a user's profile and the user tries to log in from an untrusted IP address, access to Dynamics 365 (online) is blocked.

**Requirements**

- A subscription to Azure Active Directory Premium.
- A federated or managed Azure Active Directory tenant.
- Federated tenants require that multi-factor authentication (MFA) be enabled.

## Additional security considerations

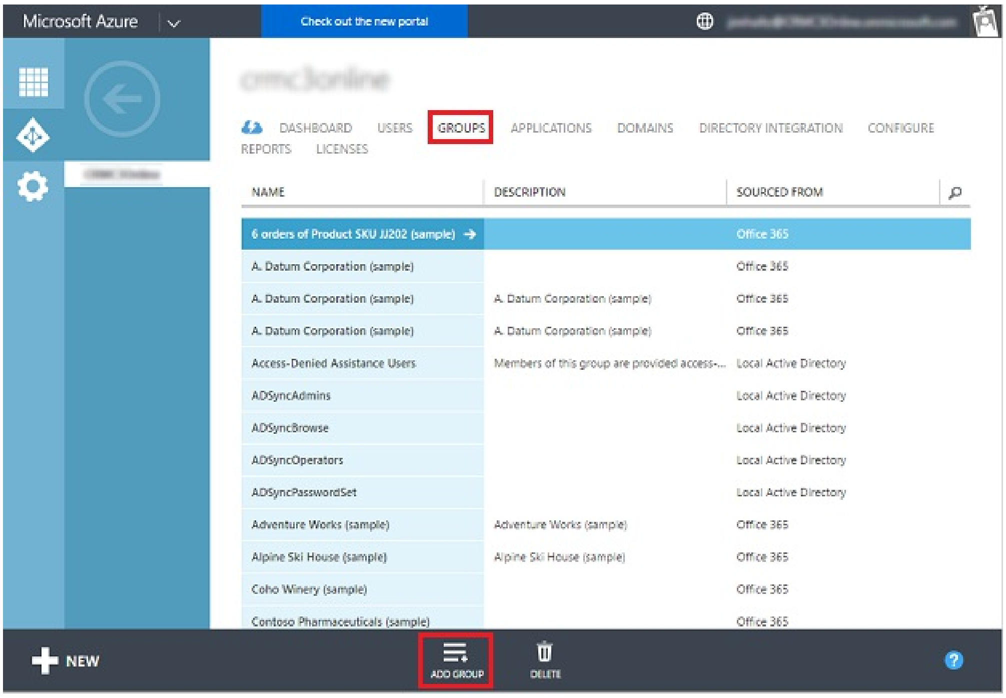
IP restriction is only enforced during user authentication. This is done by the Azure Active Directory Conditional Access capability. Dynamics 365 (online) sets a session timeout limit to balance protecting user data and the number of times users are prompted for their sign-in credentials. Trusted IP restriction for devices (including laptops) is not applied until the Dynamics 365 (online) session timeout expires.

For example, a trusted IP restriction is setup to only allow access to Dynamics 365 when users are working from a corporate office. When a Dynamics 365 user signs in into Dynamics 365 using their laptop from their office and establishes a Dynamics 365 session, the user can continue to access Dynamics 365 after leaving the office until the Dynamics 365 session timeout expires. This behavior also applies to mobile and offsite connections such as: Dynamics 365 for phones and tablets, and Dynamics 365 App for Outlook.

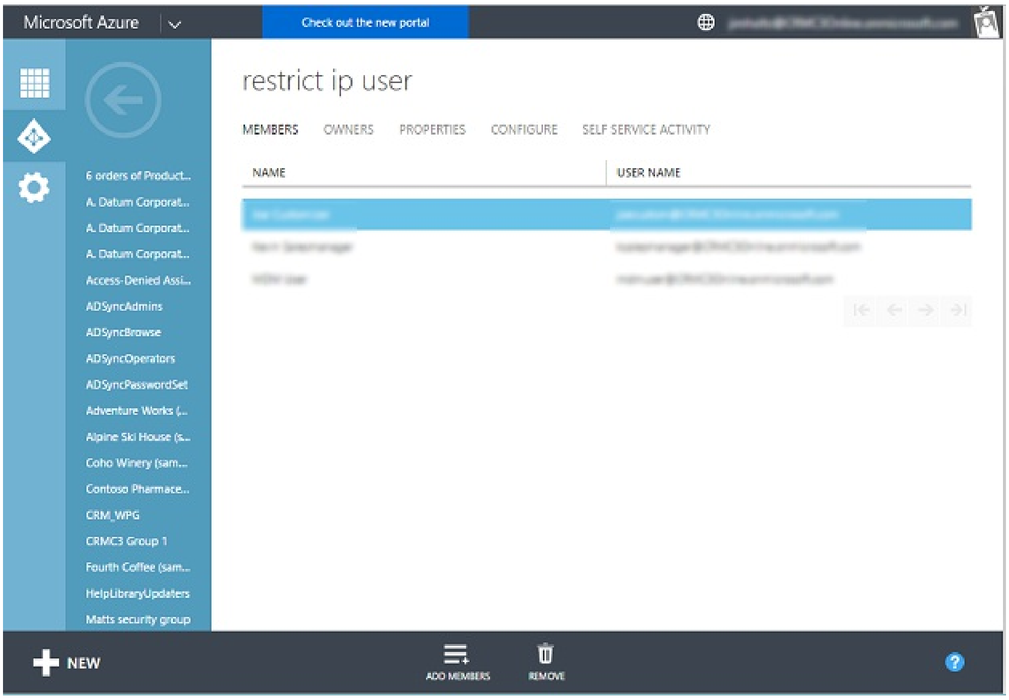
## Create security group (optional)

You can restrict access to all Users or groups of users. It's more efficient to restrict by a group if only a subset of your Azure Active Directory (AAD) users are accessing Dynamics 365 (online).

1. Sign in to your Azure portal.
2. Click **Browse** > **Active Directory**, and then select your Dynamics 365 (online) directory.
3. Click **Groups** > **Add Group**, and then fill in the settings to create a new group.




4. Click the group you created and add members.




# Create a location based access rule

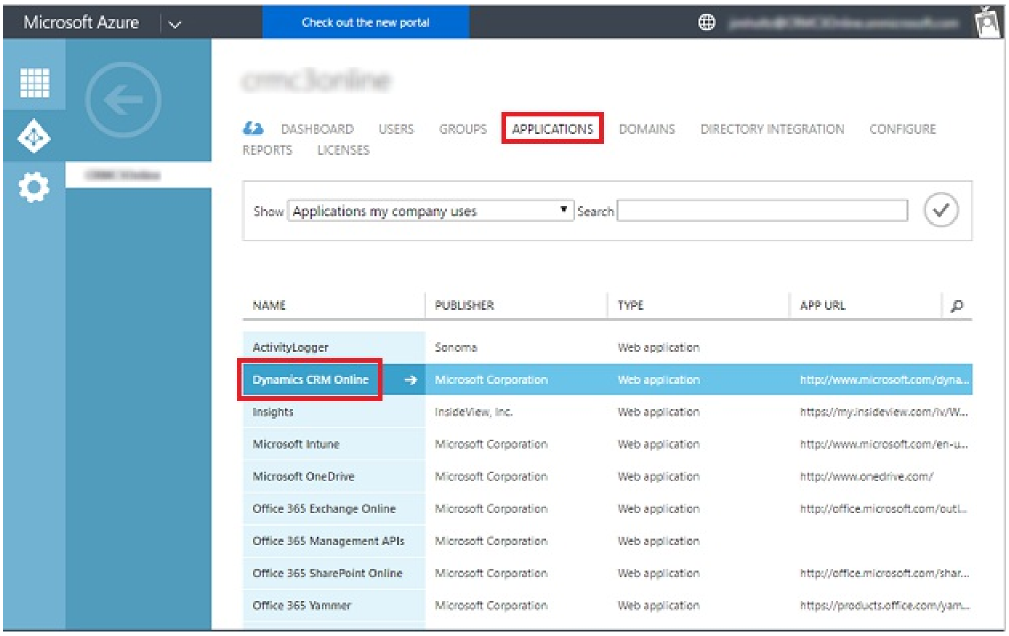
Access restriction is set using Azure Active Directory (AD) Conditional Access. See Getting started with conditional access to Azure AD. You control Conditional Access through an access rule.

> **NOTE**
>
> Setting Conditional Access is only available with an Azure Active Directory Premium license. Upgrade your Azure AD to a Premium license in the Office 365 admin center (**https://portal.office.com** > **Billing** > **Purchase services**).

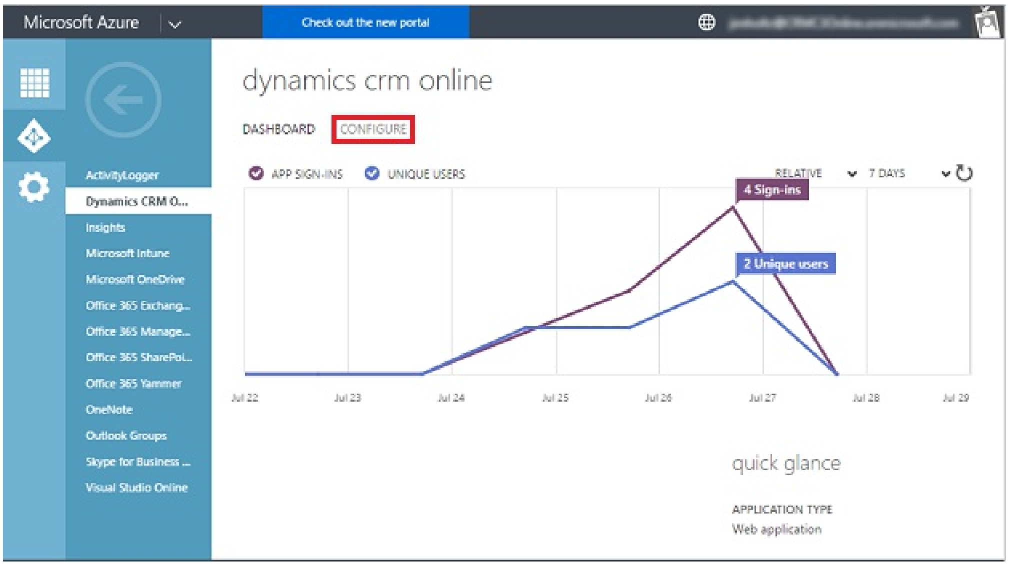
1. Sign in to your Azure portal.

2. Click **Browse** > **Active Directory**, and then select your Dynamics 365 (online) directory.

3. Click **Applications**, and then click the **Dynamics 365 Online** web application.




4. Click **Configure**.



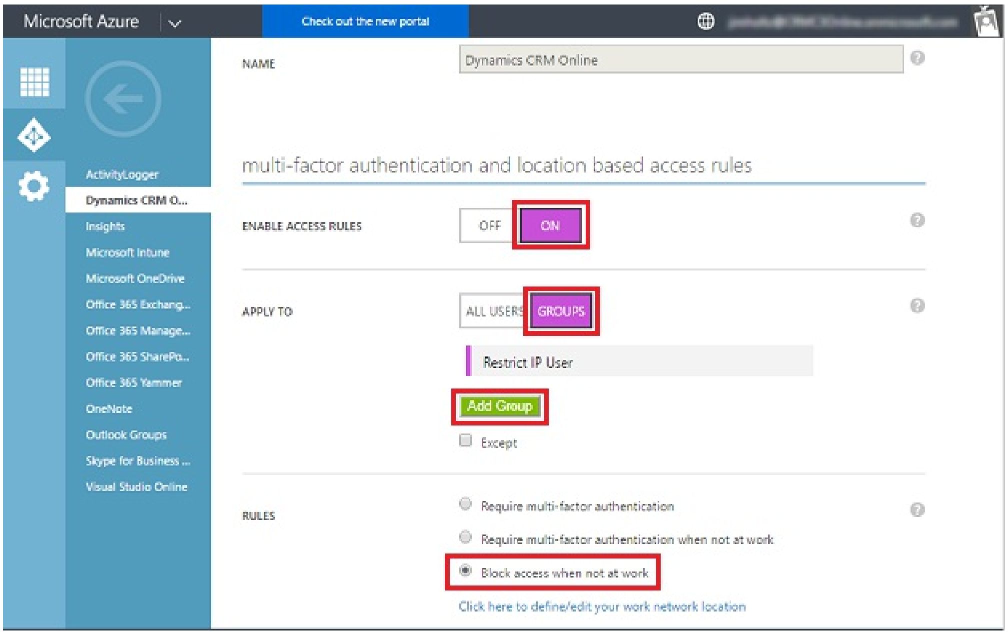

5. Set the following on the Properties page:

   a. Set **Enable Access Rule** to **On**.

   b. Optional: Set **Apply to** to **Groups**.

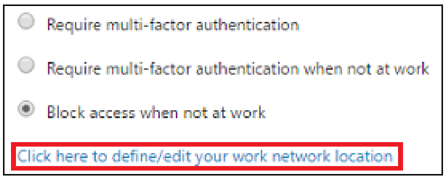
   c. Optional: Click **Add Group** to select a group.

   d. Set **Rules** to **Block access when not at work**.

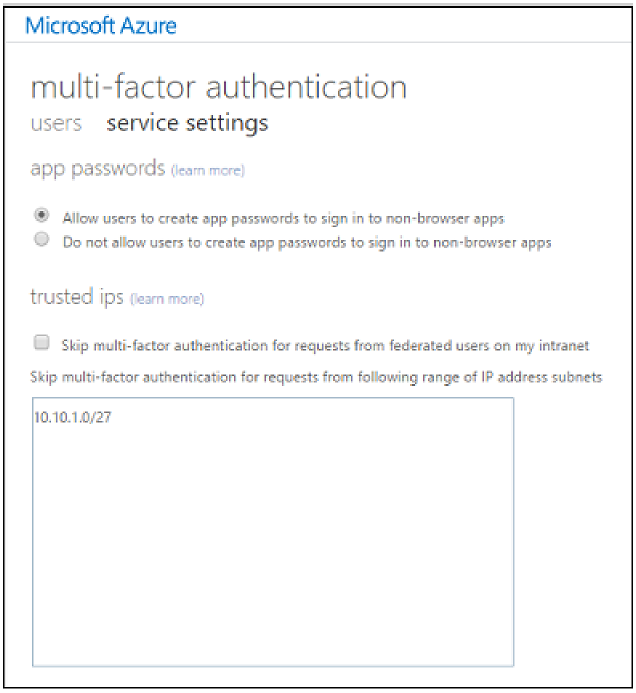



e. Click **Save** > **OK**.

f. Click **Click here to define/edit your work network location**.




6. Enter trusted IP addresses (using CIDR notation).




7. Click **Save**.

### See also

How to set Azure Active Directory device-based conditional access policy for access control to Azure Active Directory connected applications

# Invite users with Azure Active Directory B2B collaboration

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can invite other users to access your Dynamics 365 (online) instance. The Office 365 Global admin can do this through the Azure portal. Invited users can access your Dynamics 365 (online) instance using their own login credentials once a Dynamics 365 license and a security role are assigned to them. You don't need to create a new user account and temporary password for these invited users in your own Office 365 tenant.

## Requirements

- To send business-to-business (B2B) user invitations, you must have an Azure Active Directory Global admin role.
- To bulk- invite users, get the latest Azure Active DirectoryPowerShell which can be downloaded from the PowerShell module's release page.

## Incompatibilities

The following Dynamics 365 features are not supported for B2B invited users.

1. Unified Service Desk client

   Invited users will not be able to use the Unified Service Desk client to log into the host tenant's Dynamics 365.

2. Dynamics 365 App for Outlook

   Invited users will not be able to use their own tenant email addresses when performing email related transactions in the host Dynamics 365 instance. Server-side synchronization of invited users' incoming and outgoing emails are not supported as there can be complications, especially for invited users who are already syncing their emails in their own Dynamics 365 tenant.

3. Invited users cannot perform email activity using their own email address. Dynamics 365 (online) only synchronizes incoming and outgoing emails from Microsoft Exchange Online that is hosted in the same Office 365 tenant.

4. Office 365 Groups

   Office 365 Groups for Dynamics 365 connects a group to Dynamics 365 (online). Data (including new conversations and documents) are stored in the Exchange and/or SharePoint system. Since invited users belong to a different Office 365 tenant, the invited users do not have permission to create Office 365 Groups in the invited-to Office 365 tenant. However, they can participate in the Office 365 Groups conversations as a guest in their Outlook Inbox, but not within Dynamics 365 (online).

## Invite a user

You can add users to Dynamics 365 through Azure Active Directory B2B user collaboration. Global admins and limited admins can use the Azure portal to invite B2B collaboration users to the directory, to any security group, or to any application.

Admins can use one of the following methods to invite B2B users to their Dynamics 365 instance:

1. Invite users to your Dynamics 365 instance that has a security group.

   - See Admins adding guest users to a group.

   - See Control user access to instances: security groups and licenses on how to use security groups for your Dynamics 365 instances.

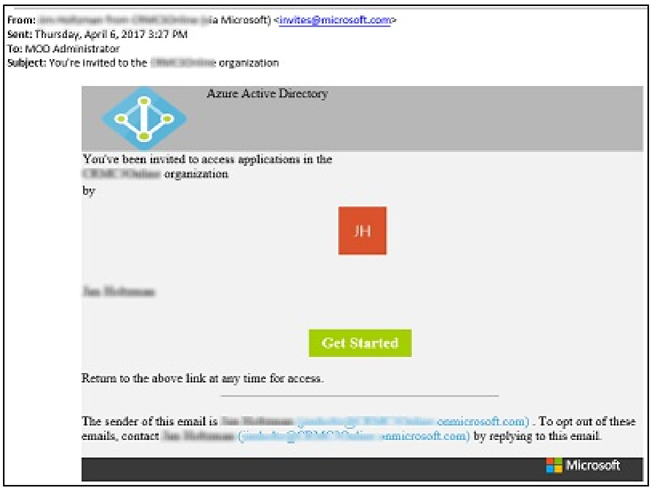
2. Invite users to your Dynamics 365 instance that does not have a security group.

   - See Admins adding guest users to the directory.

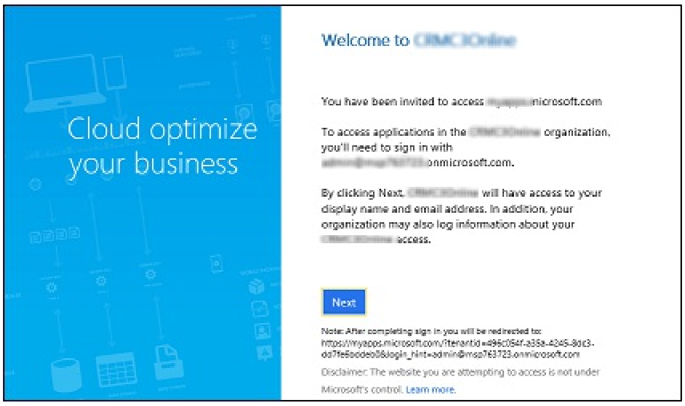
3. Bulk-invite guest users using a .csv file.

   - See PowerShell example.

   Your invited user will receive an email invitation to get started with B2B user collaboration.




   When your user accepts the invitation by clicking on the **Get Started** link on the invitation email, they will be prompted to accept the invitation.



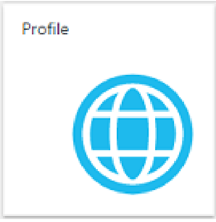

> **NOTE**
>
> Until you add a license to the user account, the user will not have access to Dynamics 365 (online). Follow the steps below to add a Dynamics 365 license through the Azure portal.

## Update user's name and usage location

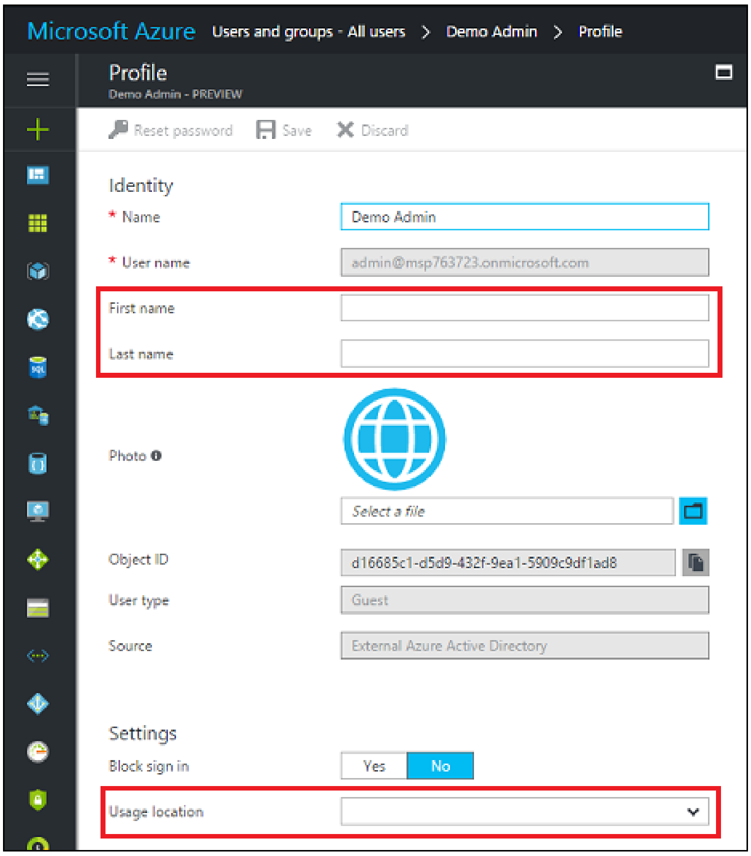
To assign a Dynamics 365 (online) license, the invited user's **Usage location** must be specified. Admins can update the invited user's profile on the Azure portal.

1. Go to **Azure Active Directory** > **Users and groups** > **All users**. If you don't see the newly created user, refresh the page.

2. Click on the invited user, and then click **Profile**.




3. Update **First name**, **Last name**, and **Usage location**.



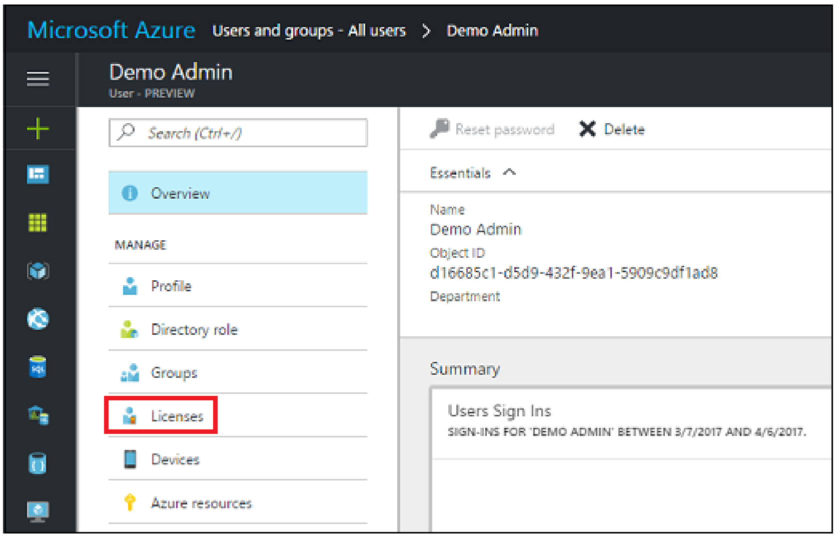

4. Click **Save**, and then close the Profile blade.

## Assign invited users a Dynamics 365 license and security role

Assign your invited users a Dynamics 365 (online) license and security role so the user can use Dynamics 365.

1. Go to **Azure Active Directory** > **Users and groups** > **All users**. If you don't see the newly created user, refresh the page.

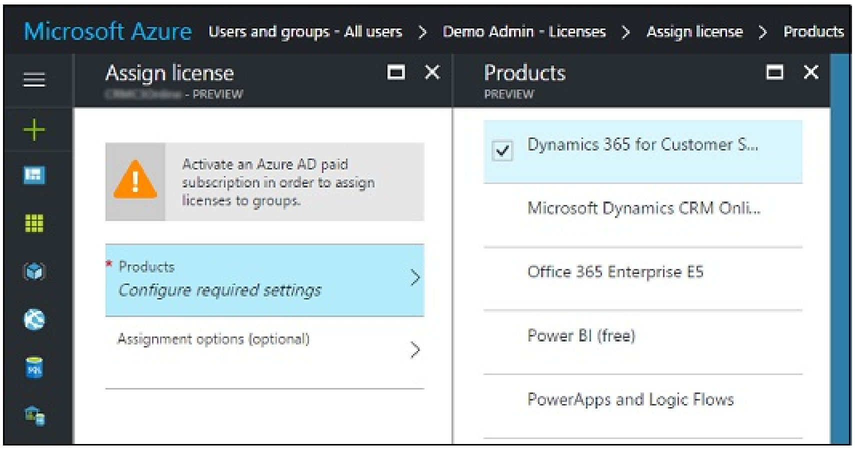
2. Click on the invited user, and then click **Licenses**.




3. Click **+Assign**.

4. Click **Configure required settings**.

5. Select the Dynamics 365 product to license.




6. Click **Select**, and then click **Assign**.

   Next, assign the invited users with appropriate security roles for the Dynamics 365 instance so they can access it. See Create users and assign Dynamics 365 (online) security roles.

## Update invited user's email address in the invited-to Dynamics 365 instance

If you're using a version prior to Dynamics 365, you need to update the invited user's email address. In Dynamics CRM, go to **Settings** > **Security** > **Users**. Select a user, and then update the invited user's email address.

## Approve email or enable mailbox (not supported)

Since server-side synchronization is not supported, Dynamics 365 System admins cannot approve an invited email address or mailbox since emails cannot be synced from the invited user's Microsoft Exchange.

## Notify your invited users

To complete the user invitation, notify your invited users and provide them with the URL for the instance they are invited to (for example, https://contoso.crm.dynamics.com).

**See also**

Azure AD B2B Collaboration is Generally Available!
Azure Active Directory B2B collaboration code and PowerShell samples
Azure Active Directory B2B collaboration frequently-asked questions (FAQ)
Azure Active Directory B2B Collaboration
Azure AD B2B: New updates make cross-business collab easy

# Global and Service administrators can administer without a license

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

By default, all Office 365 Global administrators and Office 365 Service administrators who do not have a Dynamics 365 (online) license are granted the following two levels of permission in Dynamics 365 (online).

- System administrator security role
- Administrative access mode

The system administrator security role is typically granted to Dynamics 365 administrators giving them unrestricted access to the administrative (Settings) areas, which are used for managing and configuring features of Dynamics 365.

Administrative access mode limits access to those areas of Dynamics 365 used to configure or customize the system.

To give these administrators access to additional areas, such as the Sales, Marketing, and Service areas, a Dynamics 365 (online) license must be added to the Office 365 Global administrator or Office 365 Service administrator user account, by using the Office 365 Admin Center. Note that Administrative access mode cannot be changed on the user form in the Dynamics 365 (online) application.

## Create a Dynamics 365 administrator account

1. Sign in to the Office 365 admin center, and then choose **Users** > **Active Users**.
2. Select an existing user in the list. If you want to create a new administrative user, see Create or edit users and Assigning admin roles.
3. Next to **Product licenses**, click **Edit**.
4. Make sure a Dynamics 365 (online) license is **not** assigned to this user, and then click **Save**.

   > **IMPORTANT**
   > Unlicensed Office 365 Global and Service administrators have access to the *administrative* areas of Dynamics 365 (online). However, if the administrator also needs access to additional areas of Dynamics 365 (online) you must select a Dynamics 365 (online) license for the user.

5. Next to **Roles**, click **Edit** and then click either **Global administrator** or **Customized administrator** > **Service administrator**. For more information about these roles, see Assigning admin roles.
6. Enter an alternate email address, and then click **Save**.

**See also**

Manage subscriptions, licenses, and user accounts

# Cancel your subscription

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

We are sorry that you are considering canceling your subscription with Dynamics 365. This topic contains information you'll need before you cancel your subscription. For additional details, see Section 4 of the Microsoft Dynamics 365 Online Service Agreement.

## Before you call

Before you call, make sure that you have the following information ready:

- Billing administrator's Microsoft account and password
- Organization URL and name
- The day that you want your subscription to Dynamics 365 terminated

You should have also made the following decisions:

- Do you want to keep your existing data?
- Do you want to keep any Internet Marketing service campaigns running? If you aren't the person who signed up for the service, you must work with that person to cancel or maintain it.

## Canceling your Dynamics 365 subscription

If you have been using Dynamics 365 for training, demonstrations, or testing and you don't want to keep any of your data, you can simply contact billing support with the information in Before you call. On the Billing and subscription support page select Dynamics 365 (online). If you want to save your data, you need to also do the following:

- If you want to keep the data, you can export the data. For more information, see Export Data to Excel.
- If you want to keep your Internet Marketing service campaigns running, don't delete the activities. Search engine ads will continue to run. After the Dynamics 365 cancellation, you can cancel or manage the campaigns from Microsoft Ad Center.
- To stop the search engine ads, delete or pause all your current Internet Marketing service campaign activities. This will also stop the billing from Microsoft Ad Center with Dynamics 365. Sign in to Microsoft Ad Center with your Microsoft Ad Center credentials to cancel the account.

## Canceling your Dynamics 365 (online) subscription as part of your migration to Dynamics 365 (on-premises)

If you have decided to migrate to Dynamics 365 (on-premises Edition), you first migrate your data and then cancel your Microsoft Dynamics 365 subscription. To begin the migration process, you will need to work with one of the following Microsoft support teams.

- If you're on the Microsoft Online Services platform for Dynamics 365 (online) (most customers are), contact Technical support.

- If you're on the Microsoft Commerce Transaction Platform, contact Billing support.

  Select the Dynamics 365 (online) tab on the Billing and subscription support page for help to determine which platform you are on.

Dynamics 365 customer service will process your request, transfer your data to a secure site at the requested time, and notify your IT department that the data is available to be downloaded.

When migration is complete, you then cancel your Microsoft Dynamics 365 subscription. More information: Billing FAQs for Dynamics 365 (online).

## Canceling only the Internet Marketing service

If you’re the billing administrator for an Internet Marketing service campaign used by a Microsoft Dynamics 365 subscription, you can cancel it even if you aren’t the billing administrator of the Dynamics 365 organization. To stop the search engine ads, delete or pause all your current Internet Marketing service campaign activities. This will also stop the billing from Microsoft Ad Center with Dynamics 365. Sign in to Microsoft Ad Center with your Microsoft Ad Center credentials to cancel the account.

## Changing your mind

You have 30 days to reverse the cancellation and start using Dynamics 365 again. Contact Billing and subscription support with the same information you used to cancel your subscription. You can’t re-instate a canceled Internet Marketing service campaign, but you can sign up again. For more information, see the Service Agreement.

**See also**

# Use the service admin role to manage your tenant

10/19/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To help you administer Dynamics 365 (online), you can assign users to manage Dynamics 365 at the tenant level without having to assign the more powerful Office 365 global admin privileges.

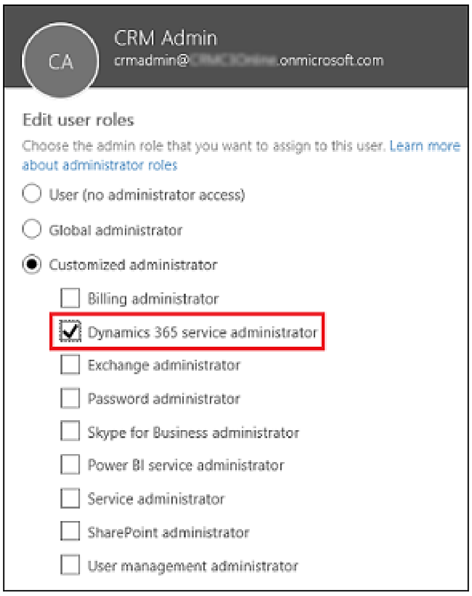
Users with the Dynamics 365 (online) service admin role can:

- Sign in to and manage multiple Dynamics 365 (online) instances. If an instance uses a security group, a service administrator would need to be added to the security group in order to manage that instance.
- Perform admin functions in Dynamics 365 because they have the Dynamics 365 system admin role. The service admin must be assigned a Dynamics 365 license.

A Dynamics 365 (online) service admin cannot do functions restricted to the Office 365 global admin such as manage user accounts, manage subscriptions, access settings for Office 365 apps like Exchange or SharePoint.

**NOTE**

The Dynamics 365 (online) service admin can manage instances of version 8.1 (Dynamics CRM Online 2016 Update 1) or later.




Here's a matrix of what's available with the various Office 365 roles.

| OFFICE 365 ROLE / FEATURE | BACKUP & RESTORE | SANDBOX COPY | CONFIGURE NEW INSTANCES | MANAGE AN INSTANCE | ADD DYNAMICS 365 LICENSES | APPROVE DYNAMICS 365 EMAILS[1] | ACCESS SUPPORT REQUESTS | ACCESS SERVICE HEALTH | ACCESS MESSAGE CENTER |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Office 365 global admin | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |

| OFFICE 365 ROLE / FEATURE | BACKUP & RESTORE | SANDBOX COPY | CONFIGURE NEW INSTANCES | MANAGE AN INSTANCE | ADD DYNAMICS 365 LICENSES | APPROVE DYNAMICS 365 EMAILS | ACCESS SUPPORT REQUESTS | ACCESS SERVICE HEALTH | ACCESS MESSAGE CENTER |
|---|---|---|---|---|---|---|---|---|---|
| Exchange admin | n/a | n/a | n/a | n/a | n/a | n/a | n/a | Yes | Yes |
| Office 365 service admin | No | No | No | No | No | No | Yes | Yes | Yes |
| Office 365 user | No | No | No | No | No | No | No | No | No |
| Dynamics 365 service admin | Yes | Yes | Yes | Yes | No | Yes[1] | Yes | Yes | Yes |

[1]To approve emails for Dynamics 365 (online), a Dynamics user requires the **Approve Email Addresses for Users or Queues** privilege and the **Office 365 global admin** role or the **Dynamics 365 service admin** role. The Dynamics 365 service admin User Principal Name (UPN) must match the email address in Dynamics 365. If the email address and the UPN are different then only an Office 365 global admin can approve the email address.

To approve emails for Dynamics 365 (on-premises), a Dynamics user requires the **Approve Email Addresses for Users or Queues** privilege. A system admin can assign the **Approve Email Addresses for Users or Queues** privilege to any security role and assign the security role to any user.

To manually assign the **Approve Email Addresses for Users or Queues** privilege to a security role:

1. In Dynamics 365, go to **Settings** > **Security** > **Security Roles**.
2. Select a security role, and then select the **Business Management** tab.
3. Under **Miscellaneous Privileges**, set the privilege level for **Approve Email Addresses for Users or Queues**.

### See also

[Manage Microsoft Dynamics 365 (online) instances]
[Manage subscriptions, licenses, and user accounts]

# Add a Partner of Record (POR) to your subscription

8/24/2018 • 2 minutes to read • Edit Online

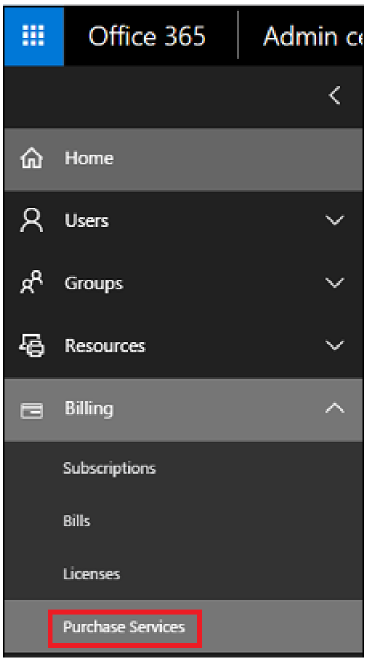
Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can choose to work with a designated Microsoft partner who can provide the sales and technical expertise you need to help set up, customize, deploy, and administer your Dynamics 365 instances. You can find a designated Partner of Record (POR) on the Microsoft Partner Center site. Once you find a partner, request their Microsoft Partner ID and designate them in the Office 365 Admin Center.

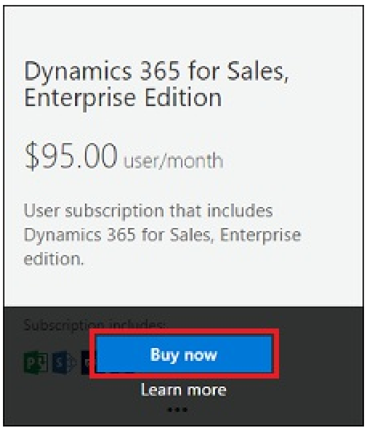
## Add a partner at time of purchase

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

2. Click **Billing** > **Purchase Services**.

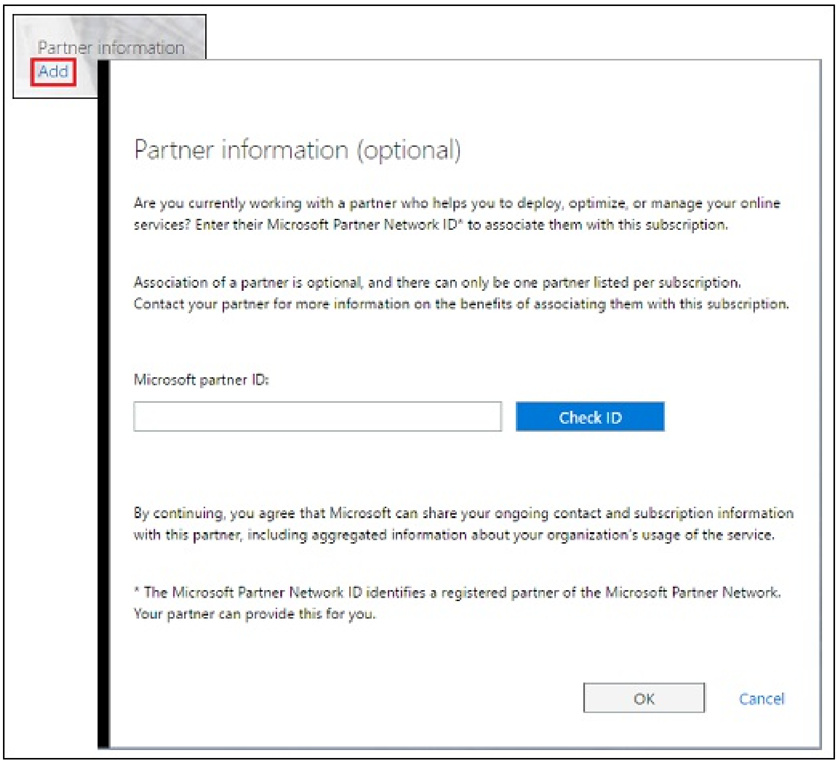



3. Select a subscription, click **Buy now**.




4. Fill in the number of users and a promo code, if you have one, then click **Next**.

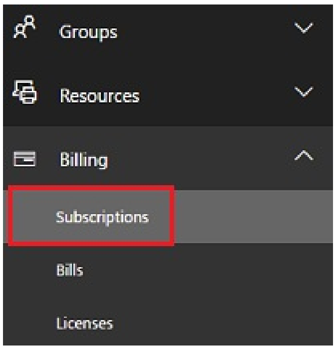
5. Under Account, click **Add** and then fill in the partner information.




## Add a partner to an existing subscription

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

2. Go to **Billing** > **Subscriptions** and select a subscription.




3. Under **Active**, click **More actions** > **Add partner of record**, and then fill in the partner information.


### See also

Add, change, or delete a subscription advisor partner

Purchase and assign Dynamics 365 (online) licenses

# For partners -- Get the credit when your customers subscribe

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

As a Dynamics 365 partner, you can help your customer sign up for a Microsoft Dynamics 365 subscription. You can customize and set up their organization for them, and reduce their effort to get started. After signing up, you can designate your company as the customer's partner of record. As the partner of record, you can help to ensure that your customer has a great trial experience and start them down the path toward success with Dynamics 365.

This document describes in detail the tasks you must complete to sign up for Dynamics 365 on behalf of your customer. It also describes the tasks a customer must do to remove your administrative privileges from the customer's company to ensure that they won't be charged for your access after the trial is complete.

## Sign up for a free trial subscription

Using a Microsoft account, which can be your ID or your customer's, sign up for a free trial of Dynamics 365. The free 30-day trial subscription includes 20 user licenses and 5 gigabytes (GB) of storage. You can activate your customer's trial subscription as a paying subscription at any time during the first 30 days. If you sign up for the trial subscription using your customer's Microsoft account, you won't need to worry about transferring ownership of the account later on.

> **IMPORTANT**
> When signing up for the free trial, note the following:
>
> - Make sure to select the correct country/region for your customer. The country/region is important for setting up your customer's billing.
> - If the customer doesn't have a billing address in the country/region you select, their account can't be activated later.
> - When you accept the terms of service, you're accepting it on behalf of your customer and representing their agreement to our terms.

1. Go to Dynamics 365.

   – OR -

   If you received an email with the customer's invitation, click the link.

2. Click **Take the TestDrive** and then fill in the information to start a TestDrive.

   Soon after you complete the sign up, you'll be notified by email that the Dynamics 365 trial subscription is ready. You'll also receive email messages that provide help for new organizations during the first 30 days of their subscription. Forward these email messages to your customer.

## Designate yourself as the partner of record

After completing the trial sign up, designate your company as the partner of record who is responsible for the customer. As the partner of record, you can help Microsoft provide our partners and customers with the best service and support. After the trial subscription becomes a paid subscription, your partner company can also claim the Dynamics 365 Software Advisor (CSA) fee for the subscription. For information about the CSA fee program, visit the Microsoft Partner Network site.

If your customer has already signed up for a Microsoft Dynamics 365 subscription, or prefers to sign up for the trial subscription themselves, they can still designate your company as the partner of record.

1. Go to the Partner of Record Designation page in CustomerSource.
2. Sign in with the same Microsoft account that you used to sign up for the trial subscription.

   If this Microsoft account is associated with more than one Microsoft Dynamics 365 subscription, select your customer's organization.
3. search for your partner company's account, and then select **Dynamics 365** as the product line from the drop-down list.

   > **TIP**
   > You can search for your partner company by company name, phone number, or their 10-digit partner MBS authorization number.
4. Select your company from the search results, and then click **Associate**.

# Transfer ownership after completing the trial

After the trial period is complete and your customer is ready to start their subscription, there are a few steps you need to complete in order to transfer ownership of the Dynamics 365 instance. If you signed up for the Microsoft Dynamics 365 subscription on behalf of the customer by using a Microsoft account other than your customer's, call Dynamics 365 Customer Service and support to request a transfer of ownership of the subscription to your customer and designate him or her as the billing administrator of the customer's Dynamics 365 organization. The billing administrator can take actions that have financial implications to the Microsoft Dynamics 365 subscription, such as:

- Upgrading to a different subscription
- Upgrading to a different release
- Purchasing additional licenses
- Purchasing additional storage

> **TIP**
> If you used a Microsoft account that belongs to someone in your customer's organization, or that can be transferred to your customer, skip this task. Give the email address and its password to your customer.

To transfer the ownership of the Dynamics 365 trial subscription, you'll need the following:

- The email address of the person from your customer's organization who will act as a system administrator and the billing administrator for the subscription.

> **IMPORTANT**
> Each organization must have a billing administrator.

- The Microsoft account that was used to sign up for the subscription.
- The name of the company used to create the trial subscription.

  You'll need this name to identify your customer's company if there is more than one account registered at the Microsoft Billing and Account Management site.
- If the free trial subscription has already been activated to a paying subscription, you'll also need the credit card number used to pay for the subscription.

**Add a system administrator**

1. Sign in to Dynamics 365 using the Microsoft account that you used to sign up for the trial.
2. Follow the steps in Create users and assign Dynamics 365 Online security roles to create a user and assign the system administrator security role. This user will also function as the billing administrator.
3. Make sure the new billing administrator has successfully signed in to your organization before transferring ownership.

**Add an account delegate**

1. Go to the Microsoft Billing and Account Management site.
2. Sign in with the same Microsoft account that you used to sign up your customer for the trial subscription.
3. Under **Billing account overview**, select the company account where you want to add a delegate.
4. Click **View or add account delegates**.
5. On the **Manage account delegates** page:
   a. Click **Add an account delegate**.
   b. Enter the Microsoft account of the new billing administrator.
   c. Click **Add delegate**.

**Request an ownership transfer**

1. Contact Dynamics 365 Customer Service and support.
2. Give the customer service representative the Microsoft account that was used to sign up for the subscription and the account ID number.
3. Give the customer service representative the Microsoft account of the new billing administrator.
4. Ask the customer service representative to promote the new billing administrator to initial user, and primary administrator.

> **IMPORTANT**
> Make sure that the new billing administrator has accepted the invitation to become a system administrator. The Microsoft account that was used to sign up for the trial subscription will be demoted to an account delegate.

## Remove the partner's administrative privileges

These tasks are optional. After you sign up your customer and register yourself as the partner of record, you will have access to your customer's subscription and billing account for the subscription. The following tasks are performed by the customer.

> **IMPORTANT**
>
> If you or your customer do not remove your privileges, the customer will be charged the standard monthly user fee for your access.

If your customer wants to remove your access to the billing account for the subscription, they must complete the following steps:

**Remove partner access to the billing account**

1. Go to the Microsoft Billing and Account Management site.
2. Sign in with the Microsoft account you use for the billing administrator at your company.
3. If the service name displayed under **Billing account overview** is not Dynamics 365, select the account from the menu that corresponds to the Microsoft Dynamics 365 subscription.
4. Click **View or add account delegates**.
5. Next to the names of account delegates you want to remove, click **Remove**.
6. In the next window, click **Yes** to confirm the removal.

> **IMPORTANT**
>
> We strongly recommend that at least two people in the organization have access to the Billing and Account Management site. To add someone, click **Add an account delegate**, and then follow the online instructions.

> **TIP**
>
> To verify that the information on the personal information page is correct, click **Go to Account Information**.

If your customer wants to disable your access to the subscription, they must complete the following steps in Dynamics 365:

**Disable partner access to the Microsoft Dynamics 365 subscription**

1. Sign in to the Microsoft Dynamics 365 subscription with the Microsoft account you use for the billing administrator at your company.
2. Follow the steps in Create users and assign Dynamics 365 Online security roles to disable the user from the partner company.

# For partners: the Delegated Administrator

9/17/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

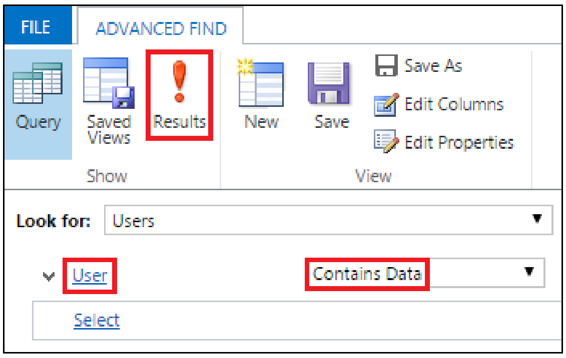
Admins for Dynamics 365 (online) can use their Office 365 global administrator role to create and edit users, reset user passwords, manage user licenses, manage domains, and assign admin permissions to other users in their organization, among other things. However, if admins want someone else to do these administrative tasks, they can delegate this role to an authorized Dynamics 365 partner. When admins authorize a partner to take on this role, the partner is referred to as a delegated admin. A delegated admin can perform routine tasks such as adding users and resetting passwords, or more complex tasks such as adding a domain. A delegated admin can have access to multiple tenants, which can simplify and consolidate tenant management.

You can see the new Delegated Admin user in Dynamics 365 (online) revisions 2040 or greater or in Microsoft Dynamics CRM 2015 Update 0.2. This user won't appear in standard provided views. You must create a custom view to see it.

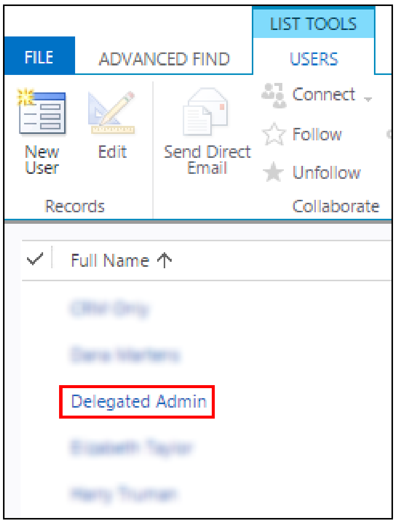
> **TIP**
> To determine your revision of Dynamics 365 (online), in the upper-right corner of your Dynamics 365 screen, choose the **Settings** gear ( ) > **About**.
>
> Your revision should be 2040 or above for both numbers highlighted.


To create a simple custom view to see the delegated admin user:

1. Go to **Settings** > **Security** > **Users**.
2. Choose **Select a view** ( ) and then choose **Create Personal View**.
3. Verify **Users** is selected in **Look for**.
4. Choose **User** > **Contains Data**, and then choose **Results**.




Delegated Admin will appear in the list of users.




## How to get authorized as a delegated admin

Dynamics 365 partners can be authorized to be delegated admins for a company in several ways:

1. A partner can offer the customer to become a delegated admin for their account by sending a link to the delegated admin offer. The customer will need to accept and sign in with their Office 365/Dynamics 365 (online) credentials.

2. A partner can send the customer a purchase offer link with delegated admin selected as part of the offer. The customer will need to sign up for the offer and accept the delegated admin offer.

3. A partner can create a trial invitation link to Dynamics 365 (online) and invite the customer to the trial via a link in email or a link on the partner's website. The trial invitation can include delegated admin if the prospect chooses to accept.

## Related information

Review the following for more information on partners and delegated admins.

- Learn how to provide technical support as a delegated admin
- Learn how to do common partner tasks
- Learn about the Microsoft Cloud Solution Provider (CSP) program

**See also**

Introducing the new Office 365 Partner admin center
Partners: Offer delegated administration
Partners: Add or delete a delegated admin

# Manage security, users, and teams

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The following section contains information about users, teams, and security in Dynamics 365.

**See also**

User Settings Utility

# Security concepts

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You use the security model in Dynamics 365 to protect the data integrity and privacy in a Dynamics 365 organization. The security model also promotes efficient data access and collaboration. The goals of the model are as follows:

- Provide a multi-tiered licensing model for users.
- Grant users access that allows only the levels of information required to do their jobs.
- Categorize users and teams by security role and restrict access based on those roles.
- Support data sharing so that users can be granted access to objects they do not own for a one-time collaborative effort.
- Prevent access to objects a user does not own or share.

You combine business units, role-based security, record-based security, and field-based security to define the overall access to information that users have in your Dynamics 365 organization.

## Business units

A business unit basically is a group of users. Large organizations with multiple customer bases often use multiple business units to control data access and define security roles so that users can access records only in their own business unit. More information: Create business units

## Role-based security

You can use role-based security to group sets of privileges together into *roles* that describe the tasks that can be performed by a user or team. Dynamics 365 includes a set of predefined security roles, each of which is a set of privileges aggregated to make security management easier. The bulk of the privileges define the ability to create, read, write, delete and share records of a specific entity type. Each privilege also defines how broadly the privilege applies: at the user level, business unit level, the entire business unit hierarchy or across the entire organization.

For example, if you sign in as a user that is assigned the Salesperson role, you have the privileges to read, write and share accounts for the entire organization, but you can only delete account records that you own. Also, you have no privileges to perform system administration tasks such as install product updates, or to add users to the system.

A user that has been assigned the Vice President of Sales role can perform a wider set of tasks (and has a greater number of privileges) associated with viewing and modifying data and resources than can a user who has been assigned to the Salesperson role. A user assigned the Vice President of Sales role can, for instance, read and assign any account to anyone in the system, while a user assigned the Salesperson role cannot.

There are two roles that have very broad privileges: System Administrator and Customizer. To minimize misconfiguration, the use of these two roles should be limited to a few people in your organization responsible for administering and customizing Dynamics 365. Organizations can also customize existing roles and create its own roles to meet their needs. More information: Security roles

## User-based access and licensing

By default, when you create a user the user has read and write access to any data for which they have permission. Also, by default, the user client access license (CAL) is set to Professional. You can change either of these settings to further restrict data and feature access.

**Access mode**. This setting determines the level of access for each user.

- Read-Write access. By default, users have Read-Write access that allows them access to data for which they have appropriate permission set by security roles.
- Administrative access. Allows access to areas that the user has appropriate permission set by security roles but doesn't allow the user to view or access business data typically found in the Sales, Service, and Marketing areas, such as accounts, contacts, leads, opportunities, campaigns, and cases. For example, Administrative access can be used to create Dynamics 365 administrators who can have access to perform a complete variety of administrative tasks, such as create business units, create users, set duplicate detection, but cannot view or access any business data. Notice that users who are assigned this access mode do not consume a CAL.
- Read access. Allows access to areas for which the user has appropriate access set by security role but the user with Read access can only view data and can't create or change existing data. For example, a user with the system administrator security role who has read access can view business units, users, and teams but can't create or modify those records.

**License type**. This sets the user CAL and determines what features and areas are available to the user. This feature and area control is separate from the user's security role setting. By default, users are created with Professional CAL for the most feature and area access that they have permission granted.

## Teams

Teams provide an easy way to share business objects and let you collaborate with other people across business units. While a team belongs to one business unit, it can include users from other business units. You can associate a user with more than one team. More information: Manage teams

## Record-based security

You can use record-based security to control user and team rights to perform actions on individual records. This applies to instances of entities (records) and is provided by access rights. The owner of a record can share, or grant access to a record to another user or team. When this is done, they must choose which rights they are granting. For example, the owner of an account record can grant read access to that account information, but not grant write access.

Access rights apply only after privileges have taken effect. For example, if a user does not have the privileges to view (read) account records, they will be unable to view any account, regardless of the access rights another user might grant them to a specific account through sharing.

## Hierarchy security

You can use the hierarchy security model for accessing hierarchical data. With this additional security, you gain a more granular access to records, allowing managers to access the records of their reports for approval or do work on reports' behalf. More information: Hierarchy security

## Field-based security

You can use field-level security to restrict access to specific high business impact fields in an entity only to specified users or teams. Like record-based security, this applies after privileges have taken affect. For example, a user may have privileges to read an account, but can be restricted from seeing specific fields in all accounts. More information: Field level security

## Security Modeling with Dynamics 365

For detailed information about and best practices for designing the security model in Dynamics 365, read the Scalable Security Modeling with Microsoft Dynamics CRM white paper available from the Microsoft Download Center.

**See also**

Field level security
Hierarchy security
Control data access
Create or edit a security role
Copy a security role
Manage users
Manage teams
Add teams or users to a field security profile
Manage security, users and teams

# Security roles and privileges

9/13/2018 • 5 minutes to read • Edit Online

Applies to PowerApps and Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To control data access, you must set up an organizational structure that both protects sensitive data and enables collaboration. You do this by setting up business units, security roles, and field security profiles.

> **TIP**
> Check out the following video: How to set up security roles in Dynamics 365.

## Security roles

A security role defines how different users, such as salespeople, access different types of records. To control access to data, you can modify existing security roles, create new security roles, or change which security roles are assigned to each user. Each user can have multiple security roles.

Security role privileges are cumulative: having more than one security role gives a user every privilege available in every role.

Each security role consists of record-level privileges and task-based privileges.

*Record-level privileges* define which tasks a user with access to the record can do, such as Read, Create, Delete, Write, Assign, Share, Append, and Append To. *Append* means to attach another record, such as an activity or note, to a record. *Append to* means to be attached to a record. More information: Record-level privileges

*Task-based privileges*, at the bottom of the form, give a user privileges to perform specific tasks, such as publish articles.

The colored circles on the security role settings page define the access level for that privilege. Access levels determine how deep or high in the organizational business unit hierarchy the user can perform the specified privilege. The following table lists the levels of access in the app, starting with the level that gives users the most access.

| | |
|---|---|
| ● | **Global**. This access level gives a user access to all records in the organization, regardless of the business unit hierarchical level that the instance or the user belongs to. Users who have Global access automatically have Deep, Local, and Basic access, also.<br><br>Because this access level gives access to information throughout the organization, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the organization.<br><br>The application refers to this access level as **Organization**. |

| | |
|---|---|
| | **Deep**. This access level gives a user access to records in the user's business unit and all business units subordinate to the user's business unit.<br><br>Users who have Deep access automatically have Local and Basic access, also.<br><br>Because this access level gives access to information throughout the business unit and subordinate business units, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business units.<br><br>The application refers to this access level as **Parent: Child Business Units**. |
| | **Local**. This access level gives a user access to records in the user's business unit.<br><br>Users who have Local access automatically have Basic access, also.<br><br>Because this access level gives access to information throughout the business unit, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business unit.<br><br>The application refers to this access level as **Business Unit**. |
| | **Basic**.<br><br>This access level gives a user access to records that the user owns, objects that are shared with the user, and objects that are shared with a team that the user is a member of.<br><br>This is the typical level of access for sales and service representatives.<br><br>The application refers to this access level as **User**. |
| | **None**. No access is allowed. |

**IMPORTANT**

To ensure that users can view and access all areas of the web application, such as entity forms, the nav bar, or the command bar, all security roles in the organization must include the Read privilege on the `Web Resource` entity. For example, without read permissions, a user won't be able to open a form that contains a web resource and will see an error message similar to this: "Missing `prvReadWebResource` privilege." More information: Create or edit a security role

### Record-level privileges

PowerApps and Dynamics 365 use eight different record-level privileges that determine the level of access a user has to a specific record or record type.

| PRIVILEGE | DESCRIPTION |
|---|---|

| PRIVILEGE | DESCRIPTION |
|---|---|
| **Create** | Required to make a new record. The records that can be created depends on the access level of the permission defined in your security role. |
| **Read** | Required to open a record to view the contents. The records that can be read depends on the access level of the permission defined in your security role. |
| **Write** | Required to make changes to a record. The records that can be changed depends on the access level of the permission defined in your security role. |
| **Delete** | Required to permanently remove a record. The records that can be deleted depends on the access level of the permission defined in your security role. |
| **Append** | Required to associate a record with the current record. For example, if a user has Append rights on an opportunity, the user can add a note to an opportunity. The records that can be appended depends on the access level of the permission defined in your security role. |
| **Append To** | Required to associate the current record with another record. For example, a note can be attached to an opportunity if the user has Append To rights on the note. The records that can be appended to depends on the access level of the permission defined in your security role. |
| **Assign** | Required to give ownership of a record to another user. The records that can be assigned depends on the access level of the permission defined in your security role. |
| **Share** | Required to give access to a record to another user while keeping your own access. The records that can be shared depends on the access level of the permission defined in your security role. |

## Overriding security roles

The owner of a record or a person who has the Share privilege on a record can share a record with other users or teams. Sharing can add Read, Write, Delete, Append, Assign, and Share privileges for specific records.

Teams are used primarily for sharing records that team members ordinarily couldn't access. More information: Manage security, users and teams

It’s not possible to remove access for a particular record. Any change to a security role privilege applies to all records of that record type.

### See also

Security concepts for Microsoft Dynamics 365
Manage security, users and teams
Create or edit a security role

# Create or edit a security role to manage access

10/29/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can create new security roles to accommodate changes in your business requirements or you can edit the privileges associated with an existing security role.

If you need to back up your security role changes, or export security roles for use in a different implementation of Dynamics 365, you can export them as part of exporting customizations. More information: Export your customizations as a solution

## Create a security role

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.
3. Click **Security Roles**.
4. On the Actions toolbar, click **New**.
5. Set the privileges on each tab.

   To change the access level for a privilege, click the symbol until you see the symbol you want. The possible access levels depend on whether the record type is organization-owned or user-owned.

   > **TIP**
   > To cycle through the access levels, you can also click the privilege column heading, or click the record type multiple times.
   > There are a set of minimum privileges that are required in order for the new security role to be used - see below Minimum Privileges for common tasks.

6. When you have finished configuring the security role, on the toolbar, click or tap **Save and Close**.

## Create a security role by Copy Role

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.

3. Click **Security Roles**.

4. Click on the Security role you want to copy from.

5. On the Actions toolbar, click **Copy Role**.

6. Enter the New Role Name, and check the box for **Open the new security role when copying is complete**.

7. Click the OK button.

8. When Copying Role is complete, navigate to each tab, ie Core Records, Business Management, Customization, etc.

9. Set the privileges on each tab.

> **TIP**
> To cycle through the access levels, you can also click the privilege column heading, or click the record type multiple times. There are a set of minimum privileges that are required in order for the new security role to be used - see below Minimum Privileges for common tasks.

# Edit a security role

Before you edit an existing security role, make sure that you understand the principles of data access. More information: Controlling Data Access

> **NOTE**
> You can't edit the System Administrator security role. To create a security role similar to the System Administrator security role, copy the System Administrator security role, and make changes to the new role.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.

3. Click **Security Roles**.

4. In the list of security roles, double-click or tap a name to open the page associated with that security role.

5. Set the privileges on each tab.

   To change the access level for a privilege, click the symbol until you see the symbol you want. The possible access levels depend on whether the record type is organization-owned or user-owned.

> **TIP**
>
> To cycle through the access levels, you can also click the privilege column heading, or click the record type multiple times.
> There are a set of minimum privileges that are required in order for the new security role to be used - see below Minimum Privileges for common tasks.

6. When you have finished configuring the security role, on the toolbar, click or tap **Save and Close**.

## Minimum privileges for common tasks

It's helpful to keep in mind the minimum privileges that are needed for some common tasks. We've created a solution you can import that provides a security role with the required minimum privileges.

Start by downloading the solution from the Download Center: CDS for Apps minimum privilege security role.

Then, follow the directions to import the solution: Import, update, and export solutions.

When you import the solution, it creates the **min prv apps use** role which you can copy (see: Create a security role by Copy Role). When Copying Role is complete, navigate to each tab - Core Records, Business Management, Customization, etc - and set the appropriate privileges.

> **IMPORTANT**
>
> You should try out the solution in a development environment before importing into a production environment.

- When logging in to Dynamics 365:
  - Assign the min prv apps use security role or a copy of this security role to your user.
  - To render an entity grid (that is, to view lists of records and other data), assign the following privileges on the Core Records tab: Read privilege on the entity, Read Saved View, Create/Read/Write User Entity UI Settings and assign the following privilege on the Business Management tab: Read User
- When logging in to Dynamics 365 for Outlook:
  - To render navigation for Dynamics 365 and all Dynamics 365 buttons: assign the min prv apps use security role or a copy of this security role to your user
  - To render an entity grid: assign Read privilege on the entity
  - To render entities: assign Read privilege on the entity

## Privacy notices

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for phones, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the phone client. Users can then access Dynamics 365 (online) by using Dynamics 365 for phones, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

The Dynamics 365 for tablets and phones, and Project Finder for Project Finder for Dynamics 365 (the "App") enables users to access their Microsoft Dynamics CRM or Dynamics 365 instance from their tablet and phone device. In order to provide this service, the App processes and stores information, such as user's credentials and the data the user processes in Microsoft Dynamics CRM or Dynamics 365. The App is provided for use only by end users of Microsoft customers who are authorized users of Microsoft Dynamics CRM or Dynamics 365. The App processes user's information on behalf of the applicable Microsoft customer, and Microsoft may disclose information processed by the App at the direction of the organization that provides users access to Microsoft Dynamics CRM or Dynamics 365. Microsoft does not use information users process via the App for any other purpose.

If users use the App to connect to Microsoft Dynamics CRM (online) or Dynamics 365 (online), by installing the App, users consent to transmission of their organization's assigned ID and assigned end user ID, and device ID to Microsoft for purposes of enabling connections across multiple devices, or improving Microsoft Dynamics CRM (online), Dynamics 365 (online) or the App.

**Location data.** If users request and enable location-based services or features in the App, the App may collect and use precise data about their location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The App may send location data to Microsoft Dynamics CRM or Dynamics 365. The App may send the location data to Bing Maps and other third party mapping services, such as Google Maps and Apple Maps, a user designated in the user's phone to process the user's location data within the App. Users may disable location-based services or features or disable the App's access to user's location by turning off the location service or turning off the App's access to the location service. Users' use of Bing Maps is governed by the Bing Maps End User Terms of Use available at https://go.microsoft.com/?linkid=9710837 and the Bing Maps Privacy Statement available at https://go.microsoft.com/fwlink/?LinkID=248686. Users' use of third party mapping services, and any information users provide to them, is governed by their service specific end user terms and privacy statements. Users should carefully review these other end user terms and privacy statements.

The App may include links to other Microsoft services and third party services whose privacy and security practices may differ from those of Microsoft Dynamics CRM or Dynamics 365. IF USERS SUBMIT DATA TO OTHER MICROSOFT SERVICES OR THIRD PARTY SERVICES, SUCH DATA IS GOVERNED BY THEIR RESPECTIVE PRIVACY STATEMENTS. For the avoidance of doubt, data shared outside of Microsoft Dynamics CRM or Dynamics 365 is not covered by users' Microsoft Dynamicss CRM or Dynamics 365 agreement(s) or the applicable Microsoft Dynamics Trust Center. Microsoft encourages users to review these other privacy statements.

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access Dynamics 365 (online) by using Dynamics 365 for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user’s device include record data, record metadata, entity data, entity metadata, and business logic.

If you use Microsoft Dynamics 365 for Outlook, when you go offline, a copy of the data you are working on is created and stored on your local computer. The data is transferred from Dynamics 365 (online) to your computer by using a secure connection, and a link is maintained between the local copy and Dynamics 365 Online. The next time you sign in to Dynamics 365 (online), the local data will be synchronized with Dynamics 365 (online).

An administrator determines whether or not an organization’s users are permitted to go offline with Microsoft Dynamics 365 for Outlook by using security roles.

Users and administrators can configure which entities are downloaded via Offline Sync by using the **Sync Filters** setting in the **Options** dialog box. Alternatively, users and Administrators can configure which fields are downloaded (and uploaded) by using **Advanced Options** in the **Sync Filters** dialog box.

If you use Dynamics 365 (online), when you use the Sync to Outlook feature, the Dynamics 365 data you are syncing is “exported” to Outlook. A link is maintained between the information in Outlook and the information in Dynamics 365 (online) to ensure that the information remains current between the two. Outlook Sync downloads only the relevant Dynamics 365 record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization’s users are permitted to sync Dynamics 365 data to Outlook by using security roles.

If you use Microsoft Dynamics 365 (online), exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from Dynamics 365 (online) to your computer by using a secure connection, and no connection is maintained between this local copy and Dynamics 365 (online).

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and Dynamics 365 (online). Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with Dynamics 365 (online) using your credentials. You’ll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization’s users are permitted to export data to Excel by using security roles.

When Dynamics 365 (online) users print Dynamics 365 data, they are effectively “exporting” that data from the security boundary provided by Dynamics 365 (online) to a less secure environment, in this case, to a piece of paper.

An administrator has full control (at the user security role or entity level) over the data that can be extracted. However, after the data has been extracted it is no longer protected by the security boundary provided by Dynamics 365 (online) and is instead controlled directly by the customer.

### See also

Security concepts for Dynamics 365
Manage security, users and teams
Copy a security role

# Save time creating a security role by copying one

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If you want to create a security role that is similar to another security role, you can copy an existing security role and save it with a new name. You can then modify the privileges and access levels to accommodate the new security role.

> **NOTE**
>
> - You can't copy a security role to a different business unit.
> - Security role privileges are subject to change with updates and the copied security role could become out-of-date. You should periodically check security role privileges. See Create an administrative user and prevent elevation of security role privilege for an alternative method to assign security role privileges that will change dynamically.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.
3. Click **Security Roles**.
4. In the list of security roles, under **Name**, click or tap to select the security role you want to copy, and then on the Actions toolbar, click or tap **More Actions** > **Copy Role**.
5. In the **Copy Security Role** dialog box, in the **New Role Name** text box, type in the name for the new security role.
6. To modify the new security role after creating a copy, verify that the **Open the new security role when copying is complete** check box is selected; otherwise, clear the check box.
7. Click **OK**.

### See also

Security concepts for Microsoft Dynamics 365
Security roles
Field level security Prevent elevation of security role privilege

# Create an administrative user and prevent elevation of security role privilege

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x
Dynamics 365 (on-premises)

The copy security role method is a quick and easy way to create a new security role based on an existing set of privileges. However, security role privileges can change with product updates which could render the new security role out-of-date and might not function as expected. This is especially true in the case where you want to allow a certain group of administrative users to assign security roles to your users. We recommend you not copy the System Administrator security role and assign it to users, since this would allow the users to elevate the assigned user to System Administrators. In addition, newer privileges from product updates will not be automatically added to the copied System Administrator security role resulting in the role having insufficient privileges to continue to assign security roles.

The following steps describe a method to create a new custom security role with privileges that will change dynamically with updates and therefore can continue to be used for security role assignments.

**Create a new custom security role that only has access to "Security Role"**

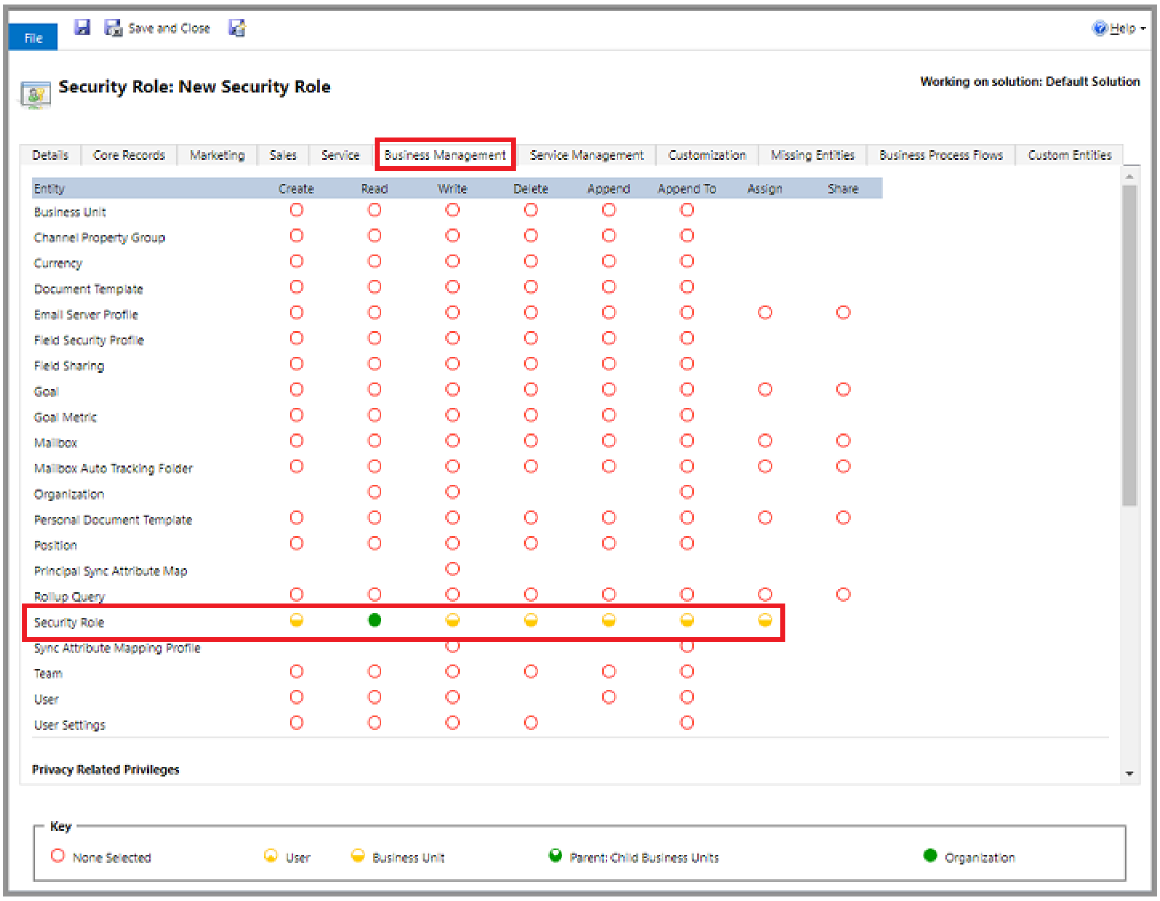
1. Make sure that you have the System Administrator permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security** > **Security Roles**, and then choose **New**.
3. Enter a role name, and then select the **Business Management** tab.
4. Scroll down to the **Entity** list and set the **Security Role** entity privileges as follows:

| PRIVILEGE | SETTING |
|---|---|
| Create | Business Unit |
| Read | Organization |
| Write | Business Unit |
| Delete | Business Unit |
| Append | Business Unit |
| Append To | Business Unit |
| Assign | Business Unit |




5. Choose **Save and Close**.

### Assign the new security role to an administrative user

1. Go to **Settings** > **Security** > **Users**.
2. Select an administrative user and then choose **Manage Roles**.
3. Select the new security role.
4. Select all the security roles that the administrative user can assign to other users.
5. Choose **OK**.

> **NOTE**
>
> Dynamics 365 is designed to prevent any elevation of security role privileges. Therefore, the administrative user **cannot** assign System Administrator, System Customizer, or any security roles that have a higher privilege.

### See also

Global and Service administrators can administer without a license

# Assign security roles to a form to more finely control access

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Control form and field access by assigning different security roles to different forms you create.

More information: Security concepts for Microsoft Dynamics 365

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Customizations**.
3. Choose **Customize the System**.
4. Enable security roles.
   a. Under **Components**, expand **Entities**, and then expand the entity you want.
   b. Choose **Forms**. In the list, choose a form to edit it if it has a form type of Main.
   c. On the **Home** tab, in the **Form** group, choose **Enable Security Roles**.
5. Assign security roles.
   a. In the **Assign Security Roles** dialog box, select the security roles to which this form will be available.
   b. To make this the fallback form, select the **Enabled for fallback** check box.

      At least one form per entity must be a fallback form (the form that is displayed to a user when no other form is available for that user's security role).

   c. Choose **OK**.
6. Preview the main form.
   a. On the **Home** tab, choose **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, choose **Close**.
7. When you're ready to save your data, choose **Save and Close**.
8. Publish your customization.
   - To publish just the edited component, choose **Save** > **Publish** on the **Home** tab.
   - To publish all unpublished components at one time, choose **Publish All Customizations**.

**NOTE**

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

# View your user profile

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

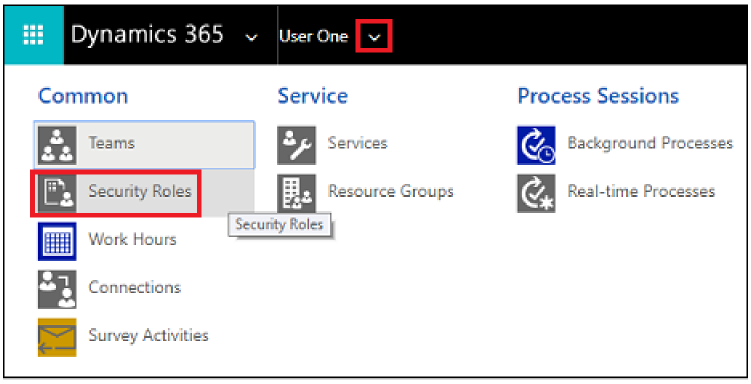
Your user profile displays useful information about you to your entire organization; for example, your contact information, your organization, and your security role. Depending on your security role, you may be able to make changes to your user profile.

1. Go to **Options**.

   In Dynamics 365, in the upper-right corner of the screen, choose the **Settings** button > **Options**.

2. Scroll down to the very bottom of the **Set Personal Options** dialog box, and then choose **View your user information**.

3. To check your security role, on the nav bar, choose the down arrow next to your name, and then choose **Security Roles**.




4. To view other profile information, such as Work Hours, Connections, and Services, on the nav bar, choose the down arrow next to your name.

**See also**

Set personal options

# Security enhancements: User session and access management

10/19/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

New for Customer Engagement in Dynamics 365 (online), version 9.0, you can use new security enhancements to better secure the Dynamics 365 (online) application.

**IMPORTANT**

These security enhancements are also available for:

- Microsoft Dynamics CRM 2016 (on-premises, version 8.2)
  The feature is available by contacting support.
- Microsoft Dynamics CRM 2016 (on-premises, version 8.1)
  The feature is available by contacting support.
- Microsoft Dynamics CRM 2015 (on-premises)
  The feature is available by contacting support.

For more information on these versions, see Security enhancements: User session and access management

**TIP**

Check out the following video: Security Enhancements: User session management.

## User session timeout

By default, Dynamics 365 (online) sets a user session timeout of 24 hours. A user is not required to log in with their credentials for up to 24 hours regardless of whether the user was active or inactive.

You can change this behavior.

- To enforce users to re-authenticate after a pre-determined period of time, admins can set a session timeout for their individual Dynamics 365 (online) instances. Users can only remain signed in the application for the duration of session. The application signs out the user when the session expires. Users need to sign-in with their credentials to return to Dynamics 365 (online).

**NOTE**

User session timeout is not enforced in the following:

1. Dynamics 365 for Outlook
2. Dynamics 365 for phones and Dynamics 365 for tablets
3. Unified Service Desk client using WPF browser (Internet Explorer is supported)
4. Live Assist (Chat)

## Configure session timeout

1. In Dynamics 365 (online), choose **Settings** > **Administration** > **System Settings** > **General** tab.
2. Under **Set session timeout**, set the values to apply to all your users.

> **NOTE**
>
> Default values are:
>
> - Maximum Session Length: 1440 minutes
> - Minimum Session Length: 60 minutes
> - How long before session expires before showing timeout warning: 20 minutes

## Inactivity timeout

By default, Dynamics 365 (online) does not enforce an inactivity session timeout. A user can remain logged in the application until the session timeout expires. You can change this behavior.

- To enforce users to automatically signed out after a pre-determined period of inactivity, admins can set an inactivity timeout period for each of their Dynamics 365 (online) instances. The application signs out the user when the inactivity session expires.

> **NOTE**
>
> Inactivity session timeout is not enforced in the following:
>
> 1. Dynamics 365 for Outlook
> 2. Dynamics 365 for phones and Dynamics 365 for tablets
> 3. Unified Service Desk client using WPF browser (Internet Explorer is supported)
> 4. Live Assist (Chat)

To enforce the inactivity session timeout for Web Resources, Web Resources need to include the ClientGlobalContext.js.aspx file in their solution.

The Dynamics 365 (online) portal has its own settings to manage its session timeout and inactivity session timeout independent of these system settings.

## Configure inactivity timeout

1. In Dynamics 365 (online), choose **Settings** > **Administration** > **System Settings** > **General tab**.
2. Under **Set inactivity timeout**, set the values to apply to all your users.

> **NOTE**
>
> Default values are:
>
> - Minimum Duration of Inactivity: 5 minutes
> - Maximum Duration of Inactivity: less than Maximum Session length or 1440 minutes

## Access management

Dynamics 365 (online) uses Azure Active Directory as the identity provider. To secure the user's access to Dynamics 365 (online), the following were implemented:

- To enforce users to re-authenticate, users are required to sign in with their credentials after they signed out within the application.
- To prevent users from sharing credentials to access Dynamics 365 (online), the user access token is validated to ensure that the user who was given access by the identity provider is the same user who is accessing Dynamics 365 (online).

## Steps for enabling security enhancements for Dynamics 365 (on-premises) deployments

These security enhancements are shipped disabled by default. Administrators can enable these enhancements when using one of the supported Dynamics 365 (on-premises) builds listed below.

> **NOTE**
>
> This applies to customers with the following versions of Dynamics 365:
>
> - Microsoft Dynamics CRM 2016 (on-premises, version 8.2)
>   The feature is included in this update.
> - Microsoft Dynamics CRM 2016 (on-premises, version 8.1)
>   The feature is available by contacting support.
> - Microsoft Dynamics CRM 2015 (on-premises)
>   The feature is available by contacting support.
>
> **Requirement** These security enhancement features require claims-based authentication for user authentication. You can configure claims-based authentication in one of two ways:
>
> - With an Internet-facing deployment (IFD). See Configure IFD for Microsoft Dynamics 365.
> - With claims-based authentication alone if Microsoft Dynamics 365 is deployed in the same domain where all Microsoft Dynamics 365 users are located, or users are in a trusted domain. See Configure claims-based authentication.

To obtain SDK sample code (for reference, not required to configure and enable session timeout):

1. Access your Dynamics 365 server using your administrator account.
2. Open a browser session and download the Dynamics 365 Software Development Kit (SDK).
3. Select and run **MicrosoftDynamics365SDK.exe**. This will extract the download and create an SDK folder on your Dynamics 365 server.
4. Open a PowerShell command prompt.
5. Navigate to the downloaded SDK folder.
6. Open the SampleCode\PS folder.

After updating to a supported on-premises version, follow the steps below to enable security enhancements.

#### User session timeout

System admins can now force users to re-authenticate after a set period. You can set an active session timeout for each of your Dynamics 365 instances. Users can only remain signed in to the application for the duration of the session. Once the session expires, they'll need to sign in again with their credentials. System admins can also require sign in for users after a period of inactivity. You can set an inactivity timeout for each of your instances. The helps prevent unauthorized access by a malicious user from an unattended device.

#### Enable user session timeout

1. Enable session timeout:

```
SetAdvancedSettings.ps1 -ConfigurationEntityName ServerSettings -SettingName AllowCustomSessionDuration
-SettingValue true
```

2. Enable inactivity timeout:

```
SetAdvancedSettings.ps1 -ConfigurationEntityName ServerSettings -SettingName
AllowCustomInactivityDuration -SettingValue true
```

### Access token management

To better protect user access and data privacy in Dynamics 365, when a user signs out in the web client and needs to return to the application, they will need to enter their credentials again in all open browser sessions. Dynamics 365 ensures that the sign-in token was originally generated for the current browser and computer.

### Enable access token management

To enable for all organizations by default, copy and run this command in PowerShell:

```
SetAdvancedSettings.ps1 -ConfigurationEntityName ServerSettings -SettingName WSFedNonceCookieEnabled -
SettingValue true
```

Sample:


-OR-

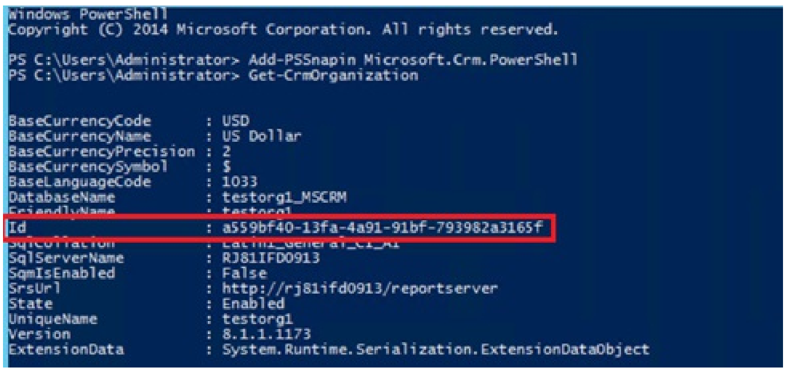
To enable for a single organization, copy and run this command in PowerShell:

```
SetAdvancedSettings.ps1 -ConfigurationEntityName Organization -SettingName WSFedNonceCookieEnabled -
SettingValue true -Id <Your organization ID GUID>
```

To get [Your organization ID GUID], open PowerShell, and run the following:

```
Add-PSSnapin Microsoft.Crm.PowerShell
Get-CrmOrganization
```

Sample:




For more information, see Get-CrmOrganization for details.

# Field level security to control access

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Record-level permissions are granted at the entity level, but you may have certain fields associated with an entity that contain data that is more sensitive than the other fields. For these situations, you use field level security to control access to specific fields.

The scope of field level security is organization-wide and applies to all data access requests including the following:

- Data access requests from within a client application, such as web browser, mobile client, or Microsoft Dynamics 365 for Outlook.
- Web service calls using the Dynamics 365 Customer Engagement Web Services (for use in plug-ins, custom workflow activities, and custom code)
- Reporting (using Filtered Views)

## Overview of field level security

Field level security is available for the default fields on most out-of-box entities, custom fields, and custom fields on custom entities. Field level security is managed by the security profiles. To implement field level security, a system administrator performs the following tasks.

1. Enable field security on one or more fields for a given entity.
2. Associate one more existing security profiles, or create one or more new security profiles to grant the appropriate access to specific users or teams.

A security profile determines the following:

- Permissions to the secure fields
- Users and Teams

  A security profile can be configured to grant user or team members the following permissions at the field level:

- **Read**. Read-only access to the field's data.
- **Create**. Users or teams in this profile can add data to this field when creating a record.
- **Update**. Users or teams in this profile can update the field's data after it has been created.

A combination of these three permissions can be configured to determine the user privileges for a specific data field.

> **IMPORTANT**
> Unless one or more security profiles are assigned to a security enabled field, only Dynamics 365 users with the system administrator security role will have access to the field.

## Example for restricting the mobile phone field for the Contact entity

Imagine you company's policy is that sales members should have different levels of access to contact mobile phone numbers as described here.

| USER OR TEAM | ACCESS |
|---|---|
| Vice presidents | Full. Can create, update, and view mobile phone numbers for contacts. |
| Sales Managers | Read-only. Can only view mobile phone numbers for contacts. |
| Salespersons and all other Dynamics 365 users | None. Cannot create, update or view mobile phone numbers for contacts. |

To restrict this field, you would perform the following tasks.

Secure the field.

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Click **Entities** > **Contact** > **Fields**.
4. Click **mobilephone**, click **Edit**.
5. Next to **Field Security**, click **Enable**, click **Save and Close**.
6. Publish the customization.

Configure the security profiles.

1. Create the field security profile for sales managers.
    a. Go to **Settings** > **Security**.
    b. Click **Field Security Profiles**.
    c. Click **New**, enter a name, such as *Sales Manager access contact mobile phone*, and click **Save**.
    d. Click **Users**, click **Add**, select the users that you want to grant read access to the mobile phone number on the contact form, and then click **Add**.

    > **TIP**
    > Instead of adding each user, create one or more teams that include all users that you want to grant read access.

    e. Click **Field Permissions**, click **mobilephone**, click **Edit**, select **Yes** next to **Allow Read**, and then click **OK**.
2. Create the field security profiles for vice presidents.
    a. Click **New**, enter a name, such as *VP access contact mobile phone*, and click **Save**.
    b. Click **Users**, click **Add**, select the users that you want to grant full access to the mobile phone number on the contact form, and then click **Add**.
    c. Click **Field Permissions**, click **mobilephone**, click **Edit**, select **Yes** next to **Allow Read**, **Allow**

**Update**, and **Allow Create**, and then click **OK**.

3. Click **Save and Close**.

Any Dynamics 365 users not defined in the previously created field security profiles will not have access to the mobile phone field on contact forms or views. The field value displays ********, indicating that the field is secured.

## Which fields can be secured?

Every field in the system contains a setting for whether field security is allowed. You can view this in the Customizations area of the web application.

There are thousands of attributes that can be secured, so there are two easier ways to look for this information. To view the entity metadata for your organization, install the Metadata Browser solution described in Browse the Metadata for Your Organization. You can also view the metadata for an uncustomized organization in the Office Excel file called EntityMetadata.xlsx included in the top-level folder of the SDK. Download the Microsoft Dynamics 365 SDK

## Best practices when you use field security

When you use calculated fields that include a field that is secured, data may be displayed in the calculated field to users that don't have permission to the secured field. In this situation, both the original field and the calculated field should be secured.

Some data, such as addresses, are actually made up of multiple fields. Therefore, to completely secure data that includes multiple fields, such as addresses, you must secure and configure the appropriate field security profiles on multiple fields for the entity. For example, to completely secure addresses for an entity, secure all relevant address fields, such as address_line1, address_line2, address_line3, address1_city, address1_composite, and so on.

**See also**

Video: Field Level Security in Microsoft Dynamics CRM 2015
Create a field security profile
Add or remove security from a field
Hierarchy security

# Set up security permissions for a field

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can restrict access to a field by creating a field security profile. After you create the profile, you assign users and or teams to that profile, and set up specific read, create, or write permissions for the field.

More information: Security concepts for Dynamics 365

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.
3. Click **Field Security Profiles**, and then on the command bar, click **New**.
4. Enter a name and a description (optional) and click **Save**.
5. Under **Common**, click **Field permissions**.
6. Select a field, and then click **Edit**.
7. Select the permissions that you want to assign to users or teams, and then click **OK**.
8. To add users or teams:

   a. Under **Members**, click **Teams** or **Users**.

   b. On the command bar, click **Add**.

   c. In the **Look Up Records** dialog box, select a team or user from the list (or search for a team or user), and then click **Select**.

   d. Repeat the preceding steps to add multiple teams or users, and then click **Add**.

**See also**

Enable or disable security for a field

# Enable or disable security for a field to control access

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Field-level security lets you set which fields users can see or edit. For example, if want to prevent users from accidentally changing an account name, you can restrict them from editing that field. In Dynamics CRM 2013, you could only set field-level security for custom fields, but in Dynamics CRM 2015 or later, you can also set field-level security for default fields. More information: Field-level security

To set which users and teams have read or write access to fields, see Set up security permissions for a field.

> **NOTE**
> You can't change the permissions on a field that you don't have permission to access.

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity that has the field you want to secure, and then click **Fields**.
4. In the list of fields, double-click the field you want to secure.
5. In the **Field** window, on the **General** tab, to the right of **Field Security**, specify whether to **Enable** or **Disable** security for the field.
6. Click **Save** or **Save and Close**.
7. When your customizations are complete, publish them:
   - To publish customizations for only the entity that you are currently editing, in the navigation pane, select the entity, and then click **Publish**.
   - To publish customizations for all unpublished entities at one time, in the navigation pane, click **Entities**, and then on the command toolbar, click **Publish All Customizations**.

**See also**

Field level security
Set up security permissions for a field

# Hierarchy security to control access

9/27/2018 • 9 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The hierarchy security model is an extension to the existing Dynamics 365 security models that use business units, security roles, sharing, and teams. It can be used in conjunction with all other existing security models. The hierarchy security offers a more granular access to records for an organization and helps to bring the maintenance costs down. For example, in complex scenarios, you can start with creating several business units and then add the hierarchy security. This will achieve a more granular access to data with far less maintenance costs that a large number of business units may require.

## Manager hierarchy and Position hierarchy security models

Two security models can be used for hierarchies, the Manager hierarchy and the Position hierarchy. With the Manager hierarchy, a manager must be within the same business unit as the report, or in the parent business unit of the report's business unit, to have access to the report's data. The Position hierarchy allows data access across business units. If you are a financial organization, you may prefer the Manager hierarchy model, to prevent managers' accessing data outside of their business units. However, if you are a part of a customer service organization and want the managers to access service cases handled in different business units, the Position hierarchy may work better for you.

**NOTE**

While the hierarchy security model provides a certain level of access to data, additional access can be obtained by using other forms of security, such as security roles.

**Manager hierarchy**

The Manager hierarchy security model is based on the management chain or direct reporting structure, where the manager's and the report's relationship is established by using the Manager field on the system user entity. With this security model, the managers are able to access the data that their reports have access to. They are able to perform work on behalf of their direct reports or access information that needs approval.

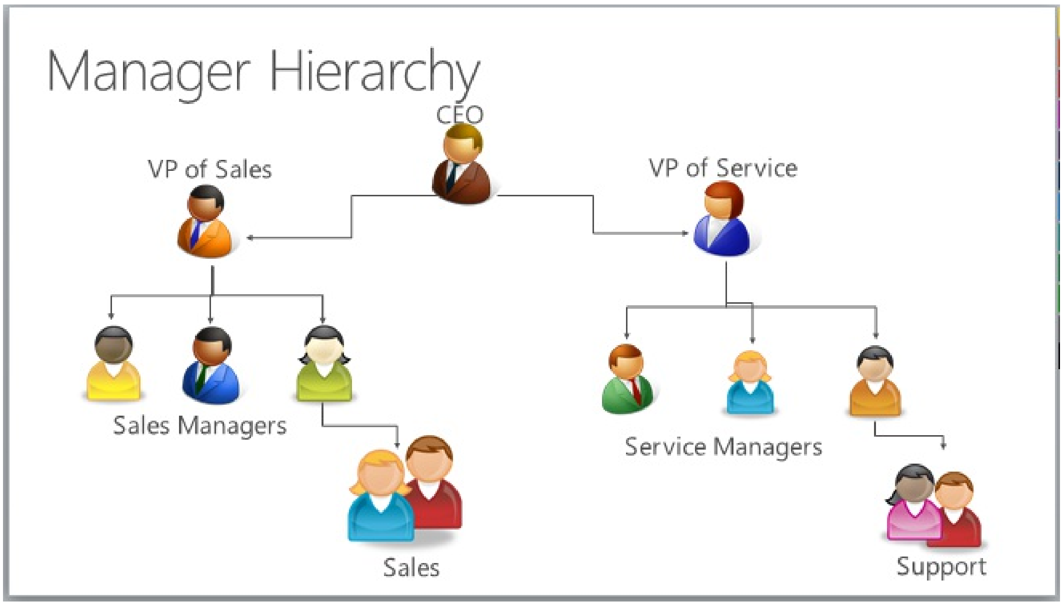
**NOTE**

With the Manager hierarchy security model, a manager has access to the records owned by the user or by the team that a user is a member of, and to the records that are directly shared with the user or the team that a user is a member of.

In addition to the Manager hierarchy security model, a manager must have at least the user level Read privilege on an entity, to see the reports' data. For example, if a manager doesn't have the Read access to the Case entity, the manager won't be able to see the cases that their reports have access to.

For a non-direct report, a manager has the Read-only access to the report's data. For a direct report, the manager has the Read, Write, Update, Append, AppendTo access to the report's data. To illustrate the Manager hierarchy security model, let's take a look at the diagram below. The CEO can read or update the VP of Sales data and the VP of Service data. However, the CEO can only read the Sales Manager data and the Service Manager data, as well as the Sales and Support data. You can further limit the amount of data accessible by a manager with "Depth". Depth is used to limit how many levels deep a manager has Read-only access to the data of their reports. For example, if the depth is set to 2, the CEO can see the data of the VP of Sales, VP of Service and Sales and

Service Managers. However, the CEO doesn't see the Sales data or the Support data.



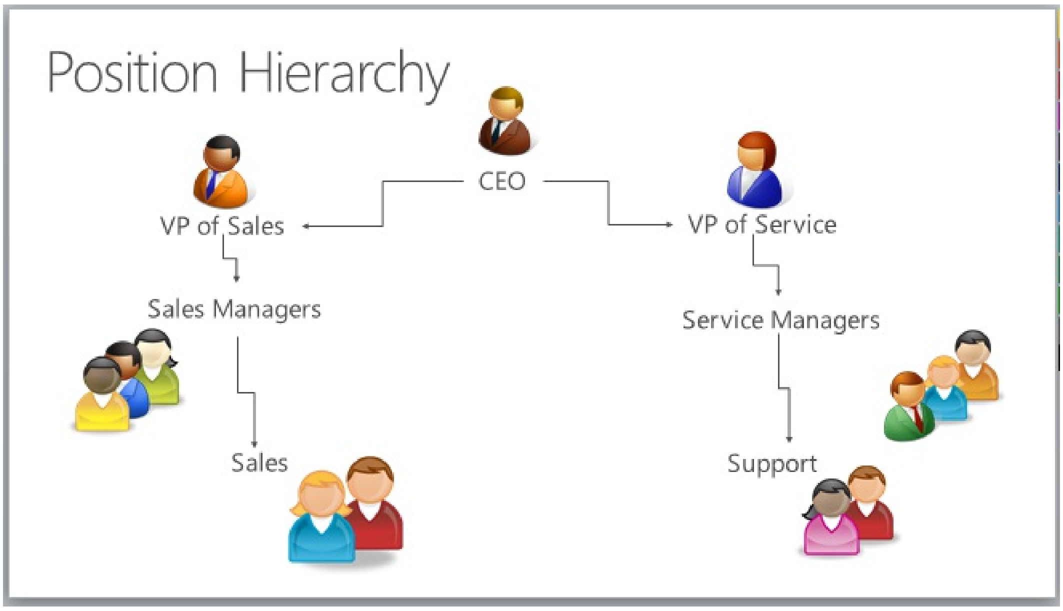

It is important to note that if a direct report has deeper security access to an entity than their manager, the manager may not able to see all the records that the direct report has access to. The following example illustrates this point.

- A single business unit has three users: User 1, User 2 and User 3.
- User 2 is a direct report of User 1.
- User 1 and User 3 have User level read access on the Account entity. This access level gives users access to records they own, the records that are shared with the user, and records that are shared with the team the user is a member of.
- User 2 has Business Unit read access on the Account entity. This allows User 2 to view all of the accounts for the business unit, including all of the accounts owned by User 1 and User 3.
- User 1, as a direct manager of User 2, has access to the accounts owned by or shared with User 2, and any accounts that are shared with or owned by a team that User 2 is a member of. However, User 1 doesn't have access to the accounts of User 3, even though his direct report may have access to User 3 accounts.

**Position hierarchy**

The Position hierarchy is not based on the direct reporting structure, like the Manager hierarchy. A user doesn't have to be an actual manager of another user to access user's data. As an administrator, you will define various job positions in the organization and arrange them in the Position hierarchy. Then, you add users to any given position, or, as we also say, "tag" a user with a particular position. A user can be tagged only with one position in a given hierarchy, however, a position can be used for multiple users. Users at the higher positions in the hierarchy have access to the data of the users at the lower positions, in the direct ancestor path. The direct higher positions have Read, Write, Update, Append, AppendTo access to the lower positions' data in the direct ancestor path. The non-direct higher positions, have Read-only access to the lower positions' data in the direct ancestor path.

To illustrate the concept of the direct ancestor path, let's look at the diagram below. The Sales Manager position has access to the Sales data, however, it doesn't have access to the Support data, which is in the different ancestor path. The same is true for the Service Manager position. It doesn't have access to the Sales data, which is in the Sales path. Like in the Manager hierarchy, you can limit the amount of data accessible by higher positions with "Depth". The depth will limit how many levels deep a higher position has a Read-only access, to the data of the lower positions in the direct ancestor path. For example, if the depth is set to 3, the CEO position can see the data all the way down from the VP of Sales and VP of Service positions, to the Sales and Support positions.




> **NOTE**
>
> With the Position hierarchy security, a user at a higher position has access to the records owned by a lower position user or by the team that a user is a member of, and to the records that are directly shared to the user or the team that a user is a member of.
>
> In addition to the Position hierarchy security model, the users at a higher level must have at least the user level Read privilege on an entity to see the records that the users at the lower positions have access to. For example, if a user at a higher level doesn't have the Read access to the Case entity, that user won't be able to see the cases that the users at a lower positions have access to.

## Set up hierarchy security

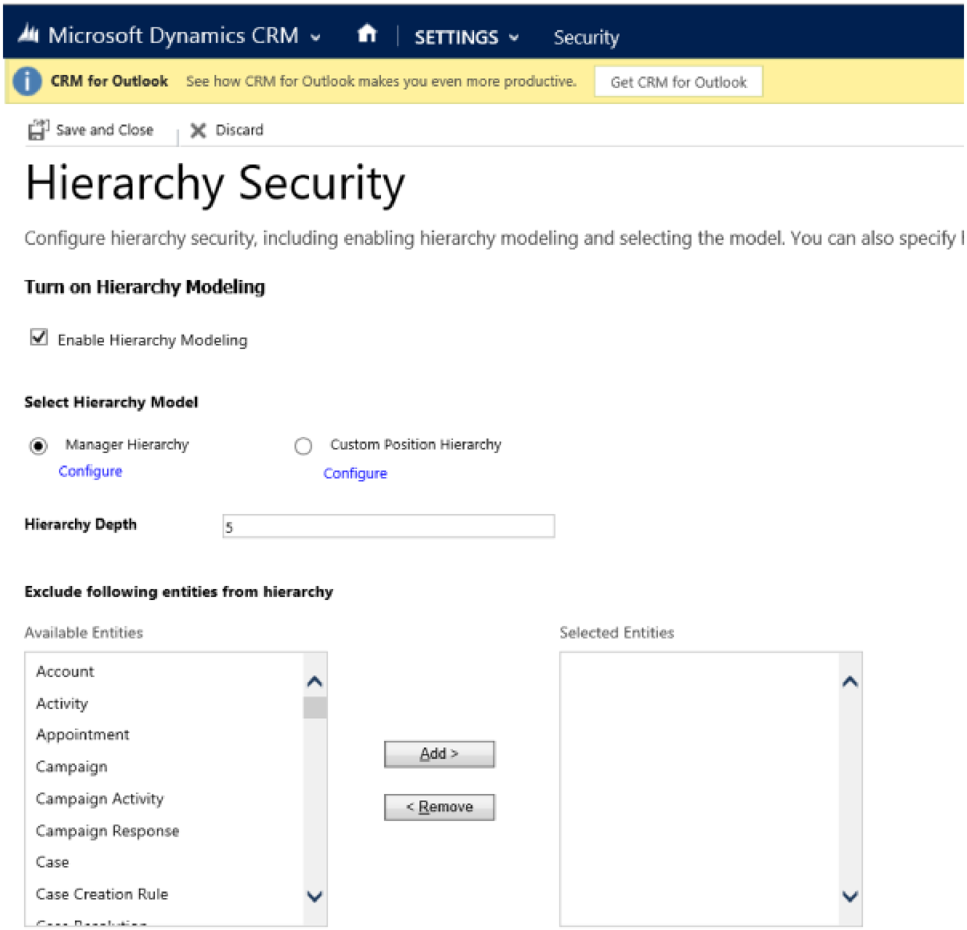
To set up the security hierarchy, you must have an Administrator security role.

The hierarchy security is disabled by default. To enable:

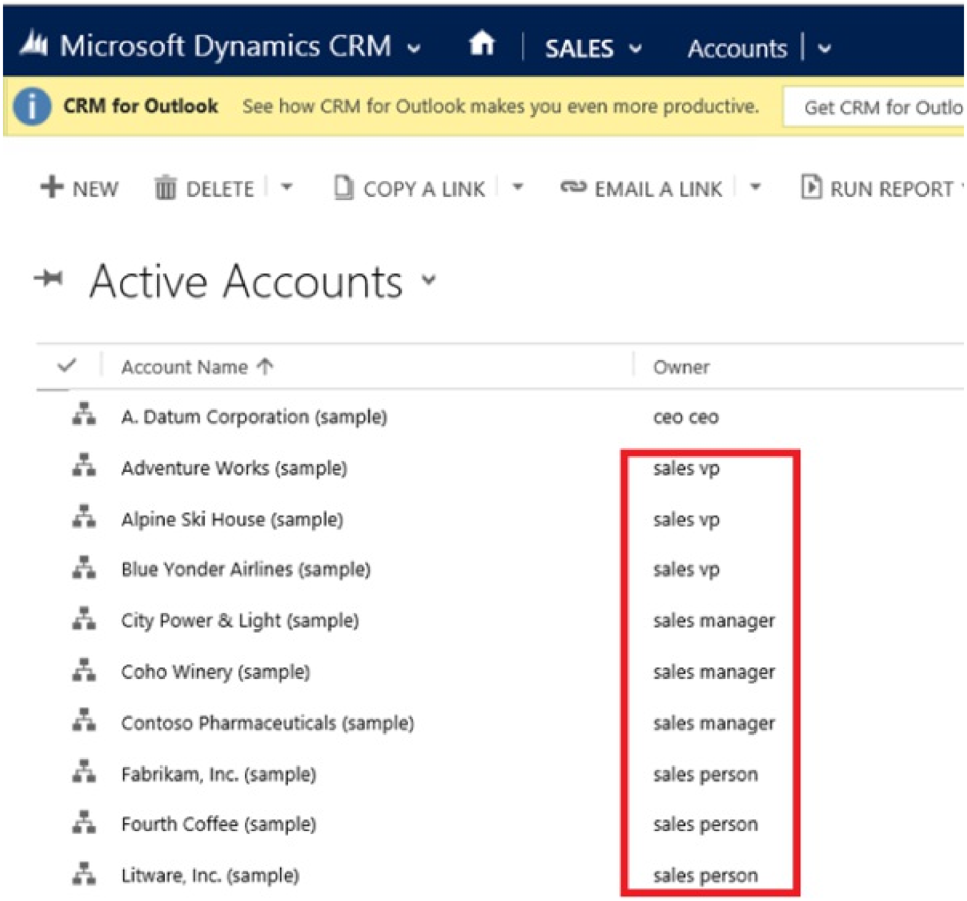
1. Go to **Settings** > **Security**.
2. Choose **Hierarchy security** and select **Enable Hierarchy Modeling**.

> **IMPORTANT**
>
> To make any changes in **Hierarchy security**, you must have the **Change Hierarchy Security Settings** privilege.

After you have enabled the hierarchy modeling, choose the specific model by selecting the **Manager Hierarchy** or **Custom Position Hierarchy**. All system entities are enabled for hierarchy security out-of-the-box, but, you can exclude selective entities from the hierarchy. The **Hierarchy Security** window shown below:




Set the **Depth** to a desired value to limit how many levels deep a manager has a Read-only access to the data of their reports. For example, if the depth equals to 2, a manager can only access his accounts and the accounts of the reports two levels deep. In our example, if you log in into Dynamics 365 not as an Administrator, who can see all accounts, but, as the VP of Sales, you'll only be able to see the active accounts of the users shown in the red rectangle, as illustrated below:

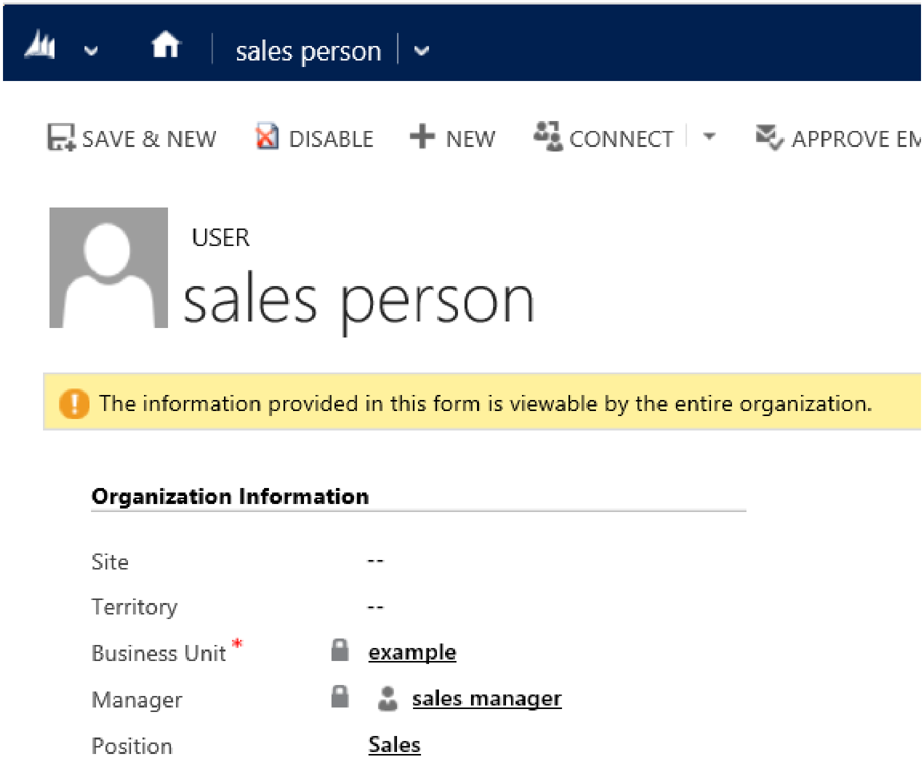



**NOTE**

While, the hierarchy security grants the VP of Sales access to the records in the red rectangle, additional access can be available based on the security role that the VP of Sales has.

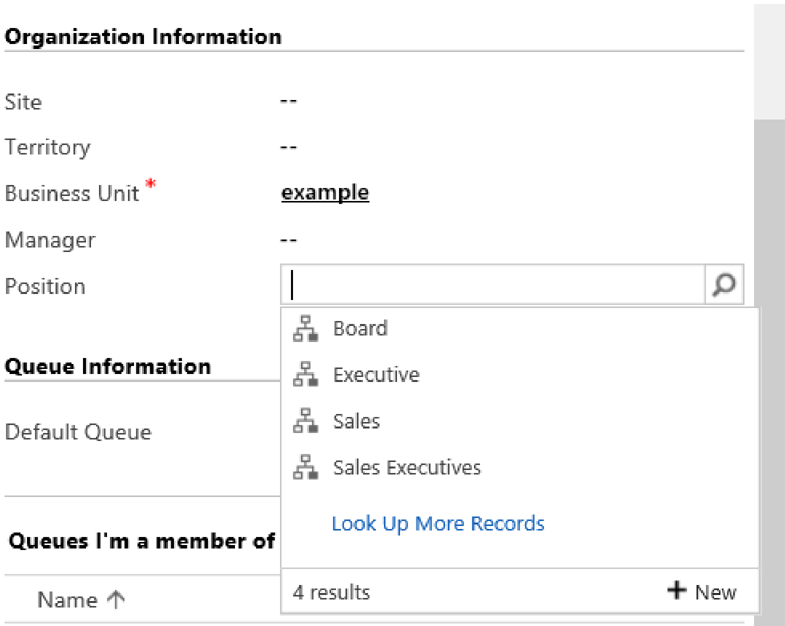
## Set up Manager and Position hierarchies

The Manager hierarchy is easily created by using the manager relationship on the system user record. You use the Manager (**ParentsystemuserID**) lookup field to specify the manager of the user. If you have already created the Position hierarchy, you can also tag the user with a particular position in the Position hierarchy. In the following example, the sales person reports to the sales manager in the Manager hierarchy and also has the Sales position in the Position hierarchy:

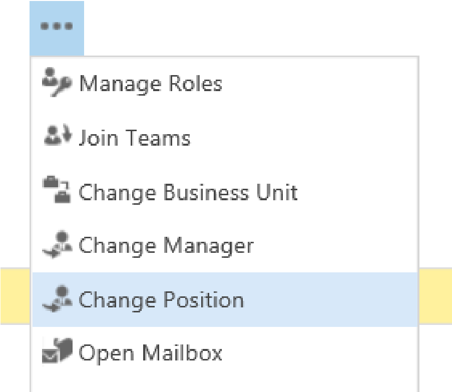



To add a user to a particular position in the Position hierarchy, use the lookup field called Position on the user record's form, as show below:

> **IMPORTANT**
> To add a user to a position or change the user's position, you must have the **Assign position for a user** privilege.



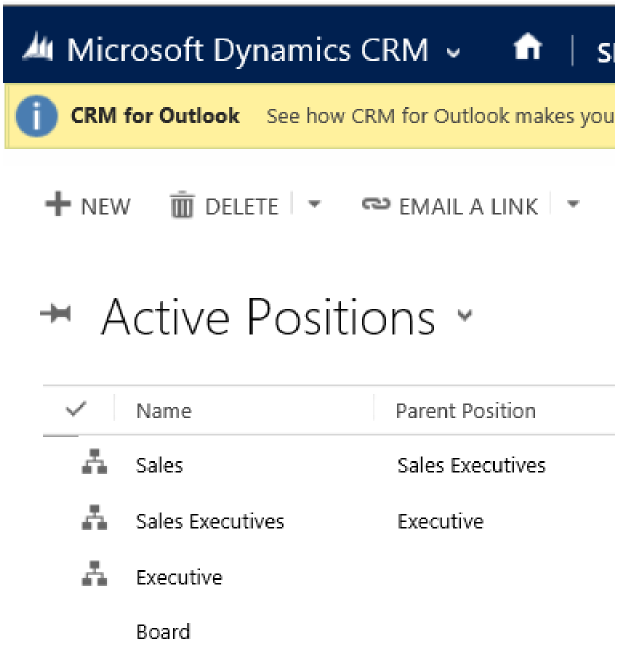

To change the position on the user record's form, on the nav bar, choose **More** (...) and choose a different position, as shown below:



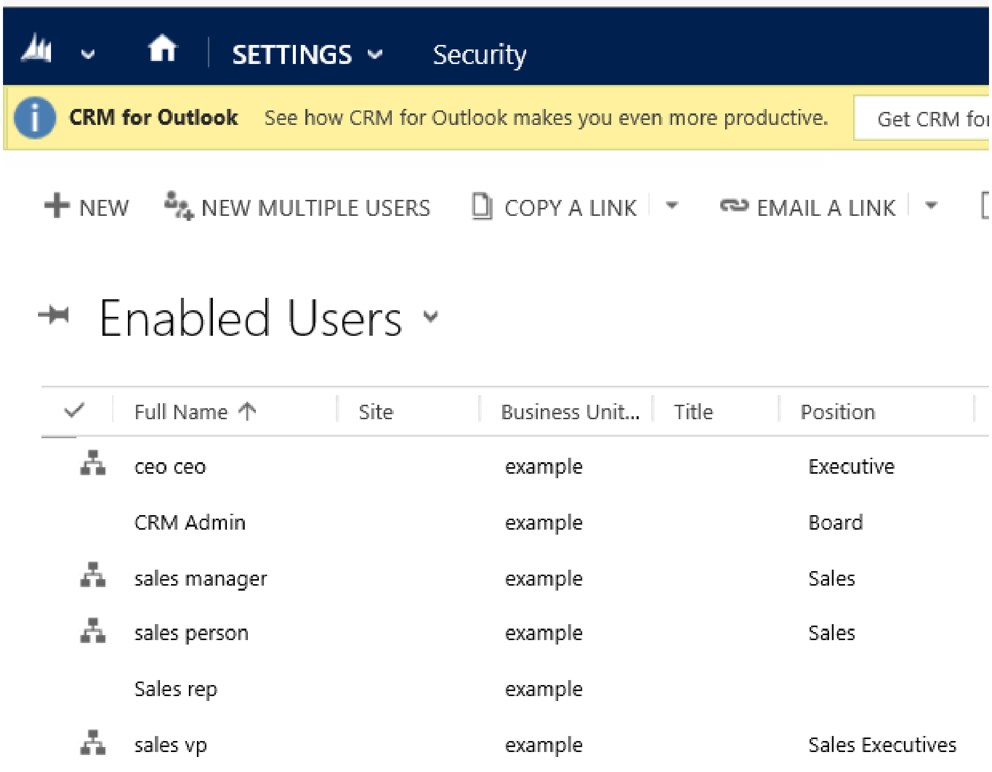

To create a Position hierarchy:

1. Go to **Settings** > **Security**.
2. Choose **Positions**.

   For each position, provide the name of the position, the parent of the position, and the description. Add users to this position by using the lookup field called **Users in this position**. Below is the example of Position hierarchy with the active positions.




The example of the enabled users with their corresponding positions is shown below:




## Performance considerations

To boost the performance, we recommend:

- Keep the effective hierarchy security to 50 users or less under a manager/position. Your hierarchy may have more than 50 users under a manager/position, but you can use the Depth setting to reduce the number of levels for Read-only access and with this limit the effective number of users under a manager/position to 50 users or less.

- Use hierarchy security models in conjunction with other existing security models for more complex scenarios. Avoid creating a large number of business units, instead, create fewer business units and add hierarchy security.

**See also**

Security concepts for Microsoft Dynamics 365
Query and visualize hierarchical data
Video: Hierarchical Security Modelling in Microsoft Dynamics CRM 2015
Video: Hierarchy Visualization in Microsoft Dynamics CRM 2015

# Create users in Dynamics 365 (online) and assign security roles

10/11/2018 • 13 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You use the Office 365 Admin Center to create user accounts for every user who needs access to Dynamics 365 (online). The user account registers the user with Microsoft Online Services environment. In addition to registration with the online service, the user account must be assigned a license in order for the user to have access to the service. Note that when you assign a user the global administrator or the service administrator role in the Microsoft Online Services environment, it automatically assigns the user the System Administrator security role in Dynamics 365. More information: Differences between the Microsoft Online services environment administrative roles and Dynamics 365 (online) security roles

## Create a user account

When you create a user account in the Office 365 Admin Center, the system generates a user ID and temporary password for the user. You have the option to let the service send an email message to the user as clear text. Although the password is temporary, you may consider copying the information to send to the user through a more secure channel, such as from an email service that can digitally encrypt the contents. For step-by-step instructions for creating a Microsoft Online Services user account, see Create or edit users in Office 365.

Check out the following video: Add People to Dynamics 365.

**NOTE**

When you create a user and assign a license in the Office 365 Admin Center, the user is also created in Dynamics 365 (online). The synchronization process between the Office 365 Admin Center and Dynamics 365 (online) can take a few minutes to complete.

By entering a user ID and password, a user can access the Office 365 Admin Center to view information about the service. However, the user will not have access to Dynamics 365 (online) until you assign at least one Dynamics 365 (online) security role to this user.

**TIP**

To force an immediate synchronization between the Office 365 Admin Center and Dynamics 365 (online), do the following:

- Sign out of Dynamics 365 (online) and the Office 365 Admin Center.
- Close all open browsers used for Dynamics 365 (online) and the Office 365 Admin Center.
- Sign back in to Dynamics 365 (online) and the Office 365 Admin Center.

## User profile information

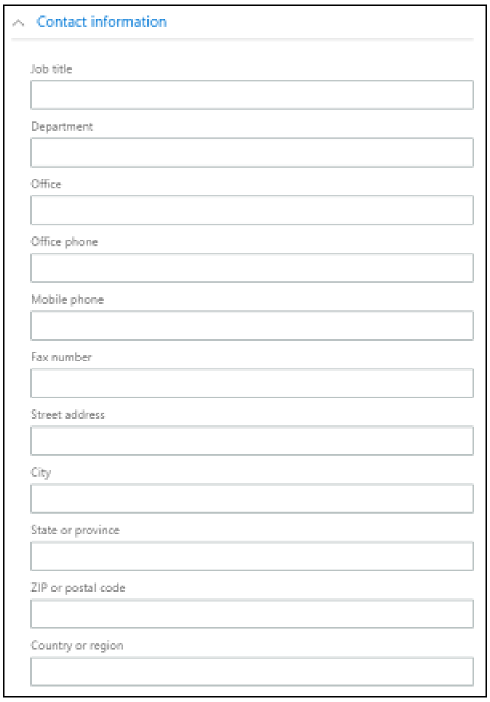
Some user profile information is maintained and managed in the Office 365 Admin Center. After you create or update a user, these user profile fields are automatically updated and synchronized in your Dynamics 365 (online) instances.

The following table shows the fields that are managed in the **Users** section of the Office 365 Admin Center.

| DYNAMICS 365 USER FORM | OFFICE 365 / AZURE ACTIVE DIRECTORY USER |
| --- | --- |
| User Name | Username |
| Full Name | First name + Last name |
| Title | Job title |
| Primary Email* | Email |
| Main Phone | Office phone |
| Mobile Phone | Mobile phone |
| Fax | Fax number |
| Address | Street address |
| Address | City |
| Address | State or province |
| Address | Country or region |

*To prevent data loss, the Primary Email field does not automatically update and synchronize with Dynamics 365 (online).

The following are Office 365 user contact fields.




## Add a license to a user account

You can license the user when you create the user account, or you can license the user later. You must assign a license to every user account that you want to access the online service.

For step-by-step instructions, see Assign, reassign, or remove licenses.

> **IMPORTANT**
>
> Licensed users must be assigned at least one Dynamics 365 security role to access Dynamics 365 (online).

**About user licenses**

- Dynamics 365 (online) uses user licenses to provide access to your organization. You need one user license per person with an active user record who logs into your organization.
- When you add a new person, the **New user account** form displays the number of user licenses available. If you reach your limit, the **On** button is no longer available. You can add additional licenses by choosing **Billing** > **Purchase Services** from the left-side menu in the Office 365 Admin Center.
- An unaccepted invitation requires a user license until the invitation expires two weeks after it was issued.
- If you have more user licenses than you are using, contact support to reduce the number of licenses. You cannot reduce the number of licenses to less than you are currently using or less than your offer allows. Any changes are reflected in your next billing cycle.
- Each user license requires a unique Microsoft account, and every user who logs on to Dynamics 365 needs a license. Most Dynamics 365 subscriptions include a specific number of user licenses.

## Assign a security role to a user

Security roles control a user's access to data through a set of access levels and permissions. The combination of access levels and permissions that are included in a specific security role sets limits on the user's view of data and on the user's interactions with that data.

Dynamics 365 (online) provides a default set of security roles. If necessary for your organization, you can create new security roles by editing one of the default security roles and then saving it under a new name.

You can assign more than one security role to a user. The effect of multiple security roles is cumulative, which means that the user has the permissions associated with all security roles assigned to the user.

Security roles are associated with business units. If you have created business units, only those security roles associated with the business unit are available for the users in the business unit. You can use this feature to limit data access to only data owned by the business unit.

For more information about the difference between Microsoft Online Services administrator roles and Dynamics 365 (online) security roles, see Grant users access to Microsoft Dynamics 365 (online) as a Microsoft Online service.

> **IMPORTANT**
>
> You must assign at least one security role to every Dynamics 365 (online) user. The service does not allow access to users who do not have at least one security role. Even if a user is a member of a team with its own security privileges, the user won't be able to see some data and may experience other problems when trying to use the system.

In Dynamics 365 (online):

1. Click **Settings** > **Security** > **Users**.
2. In the list, select the user or users that you want to assign a security role to.
3. Click **Manage Roles**.

   Only the security roles available for that user's business unit are displayed.

4. In the **Manage User Roles** dialog box, select the security role or roles you want for the user or users, and then click **OK**.

## (Optional) Assign an administrator role

You can share Microsoft Online Services environment administration tasks among several people by assigning Microsoft Online Services environment administrator roles to users you select to fill each role. You might decide to assign the global administrator role to a second person in your organization for times when you are not available.

There are five Microsoft Online Services environment administrator roles with varying levels of permissions. For example, the password reset administrator role can reset user passwords only; the user management administrator role can reset user passwords as well as add, edit, or delete user accounts; and the global administrator role can add online service subscriptions for the organization and can manage all aspects of subscriptions. For detailed information about Microsoft Online Services administrator roles, see Assigning Admin Roles.

> **NOTE**
>
> Microsoft Online Services environment administrator roles are valid only for managing aspects of the online service subscription. These roles don't affect permissions within the Dynamics 365 (online) service.

## Enable or disable users

To enable a user, assign a license to the user and add a user to the security group that is associated with an instance of Dynamics 365 (online). If you enable a user that was disabled, you must send a new invitation for the user to access the system.

To disable a user, remove a license from the user or remove the user from the security group that is associated with an instance of Dynamics 365 (online). Removing a user from the security group doesn't remove the user's license. If you want to make the license available to another user, you have to remove the license from the disabled user.

> **NOTE**
>
> Removing all security roles from the user prevents the user from signing into and accessing Dynamics 365 (online). However, it doesn't remove the license from the user and the user remains in the list of the enabled users in Dynamics 365 (online). Removing security roles from a user isn't a recommended method of removing access to Dynamics 365 (online).

You must be a member of an appropriate administrator role to do these tasks. More information: Assigning Admin Roles

**Enable a user by assigning a license to the user and adding a user to the security group**

1. Browse to the Office 365 admin center and sign in.
2. Click **Users** > **Active users** and select the user.
3. Under **Product licenses**, click **Edit**.
4. Turn on a **Dynamics 365 (online)** license, and then click **Save** > **Close**.
5. In the Office 365 Admin Center, click **Groups** > **Groups**.
6. Choose the security group that is associated with your Dynamics 365 (online) organization.
7. Under **Members**, click **Edit**, and then **Add members**. Select from the list of users with Office 365

licenses or use **Search** to find users.

8. Select the users to add to the security group, and then click **Save** > **Close** multiple times.

   To add multiple users, see: bulk add users to Office365 groups.

**Disable a user by removing a license from the user**

1. In the Office 365 Admin Center, click **Users** > **Active Users** and select a user.

2. In the right-side menu, under **Product licenses**, click **Edit**.

3. Turn off the **Dynamics 365 (online)** license, and then click **Save** > **Close** multiple times.

**Disable a user by removing the user from the security group that is associated with an instance of Dynamics 365 (online)**

1. In the Office 365 Admin Center, click **Groups** > **Groups**.

2. Choose the security group that is associated with your Dynamics 365 (online) organization.

3. In the right-side menu, under **Members**, click **Edit**.

4. Click **Remove members**, and then the select users to remove from the security group.

5. Click **Save** > **Close** multiple times.

> **NOTE**
> You can also delete users in the Office 365 Admin Center. When you remove a user from your subscription, the license assigned to that user automatically becomes available to be assigned to a different user. If you want the user to still have access to other applications you manage through Office 365, for example Microsoft Exchange Online or SharePoint, don't delete them as a user. Instead, simply remove the Dynamics 365 license you've assigned to them.

> **NOTE**
> When you sign out of the Office 365 Admin Center, you aren't signing out of Dynamics 365. You have to do that separately.

> **TIP**
> To force an immediate synchronization between the Office 365 Admin Center and Dynamics 365 (online), do the following:
>
> - Sign out of Dynamics 365 (online) and the Office 365 Admin Center.
> - Close all open browsers used for Dynamics 365 (online) and the Office 365 Admin Center.
> - Sign back in to Dynamics 365 (online) and the Office 365 Admin Center.

## Create an Administrative user account

An Administrative user is a user who has access to the Settings and Administration features but has no access to any of the customer engagement functionality. It is used to allow customers to assign administrative users to perform day-to-day maintenance functions (create user accounts, manage security roles, etc). Since the administrative user does not have access to customer data and any of the customer engagement functionalities, it does not require a Dynamics 365 (online) license (after setup).

You need to have the System Administrator security role or equivalent permissions in Dynamics 365 to create an administrative user. First, you'll create a user account in Office 365 and then in Dynamics 365 (online), select the **Administrative** access mode for the account.

> **NOTE**
> See Create an administrative user and prevent elevation of security role privilege for an example of how an Administrative user account can be used.

1. Create a user account in the Office 365 Admin Center.

   Be sure to assign a Dynamics 365 (online) license to the account. You'll remove the license (step 6) once you've assigned the **Administrative** Access Mode.

2. Go to Dynamics 365 (online).

3. Go to **Settings** > **Security**.

4. Choose **Users** > **Enabled Users**, and then click a user's full name.

5. In the user form, scroll down under **Administration** to the **Client Access License (CAL) Information** section and select **Administrative** for Access Mode.

   You then need to remove the Dynamics 365 (online) license from the account.

6. Go to the Office 365 Admin Center.

7. Click **Users** > **Active Users**.

8. Choose the Administrative user account and under **Product licenses**, click **Edit**.

9. Turn off the Dynamics 365 (online) license, and then click **Save** > **Close** multiple times.

## Create a non-interactive user account

The non-interactive user is not a 'user' in the typical sense – it is not a person but an access mode that is created with a user account. It is used for programmatic access to and from Dynamics 365 between applications. A non-interactive user account lets these applications or tools, such as a Dynamics 365 to ERP connector, authenticate and access Dynamics 365 (online), without requiring a Dynamics 365 (online) license. For each instance of Dynamics 365 (online), you can create up to five non-interactive user accounts.

You need to have the System Administrator security role or equivalent permissions in Dynamics 365 to create a non-interactive user. First, you'll create a user account in Office 365 and then in Dynamics 365 (online), select the non-interactive access mode for the account.

1. Create a user account in the Office 365 Admin Center.

   Be sure to assign a Dynamics 365 (online) license to the account.

2. Go to Dynamics 365 (online).

3. Go to **Settings** > **Security**.

4. Choose **Users** > **Enabled Users**, and then click a user's full name.

5. In the user form, scroll down under **Administration** to the **Client Access License (CAL) Information** section and select **Non-interactive** for Access Mode.

   You then need to remove the Dynamics 365 (online) license from the account.

6. Go to the Office 365 Admin Center.

7. Click **Users** > **Active Users**.

8. Choose the non-interactive user account and under **Product licenses**, click **Edit**.

9. Turn off the Dynamics 365 (online) license, and then click **Save** > **Close** multiple times.

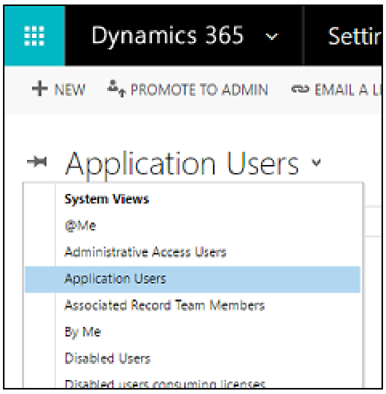
10. Go back to Dynamics 365 (online) and confirm that the non-interactive user account **Access Mode** is still set for **Non-interactive**.

## Create an application user

Introduced in December 2016 Update for Dynamics 365 (online), you can use server-to-server (S2S) authentication to securely and seamlessly communicate with December 2016 update for Dynamics 365 (online) with your web applications and services. S2S authentication is the common way that apps registered on Microsoft AppSource use to access the Dynamics 365 data of their subscribers. All operations performed by your application or service using S2S will be performed as the application user you provide rather than as the user who is accessing your application.

All application users are created with a non-interactive user account, however they are not counted towards the five non-interactive user accounts limit. In addition, there is no limit on how many application users you can create in an instance.

You will need to create a custom security role and an application user to associate with your registered app. For more information, see Build web applications using Server-to-Server (S2S) authentication.




## How stub users are created

A stub user is a user record that has been created as a placeholder. For example, records have been imported that refer to this user but the user does not exist in Dynamics 365 (online). This user cannot log in, cannot be enabled, and cannot be synchronized to Office 365. This type of user can only be created through data import.

A default security role is automatically assigned to these imported users. The **Salesperson** security role is assigned in a Dynamics 365 Customer Engagement instance and the **Common Data Service User** security role is assigned in a PowerApps environment.

### See also

Manage subscriptions, licenses, and user accounts
Assigning Admin Roles
Add users to Office 365 for business
Security roles and privileges
Manage Microsoft Dynamics 365 (online) licenses

# Manage teams

9/27/2018 • 6 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Using teams in Dynamics 365 is optional. However, teams provide an easy way to share business objects and let you collaborate with other people across business units. While a team belongs to one business unit, it can include users from other business units. You can associate a user with more than one team.

You can use two types of teams:

- An *owner* team owns records and has security roles assigned to the team. The team's privileges are defined by these security roles. In addition to privileges provided by the team, team members have the privileges defined by their individual security roles and by the roles from other teams in which they are members. A team has full access rights on the records that the team owns.
- An *access* team doesn't own records and doesn't have security roles assigned to the team. The team members have privileges defined by their individual security roles and by roles from the teams in which they are members. The records are shared with an access team and the team is granted access rights on the records, such as Read, Write, or Append.

## Owner team or access team?

Choosing the type of the team may depend on the goals, nature of the project, and even the size of your organization. There are a few guidelines that you can use when choosing the team type.

**When to use owner teams**

- Your organization's policies require the ability for records to be owned by entities other than users, such as the team entity.
- The number of teams is known at the design time of your Dynamics 365 system.
- Daily reporting on progress by owning teams is required.

**When to use access teams**

- The teams are dynamically formed and dissolved. This typically happens if the clear criteria for defining the teams, such as established territory, product, or volume are not provided.
- The number of teams is not known at the design time of your Dynamics 365 system.
- The team members require different access rights on the records. You can share a record with several access teams, each team providing different access rights on the record. For example, one team is granted the Read access right on the account and another team, the Read, Write, and Share access rights on the same account.
- A unique set of users requires access to a single record without having an ownership of the record.

## About owner teams

An owner team can own one or more records. To make a team an owner of the record, you must assign a record to the team.

While teams provide access to a group of users, you must still associate individual users with security roles that grant the privileges they need to create, update, or delete user-owned records. These privileges can't be applied by assigning security roles to a team and then adding the user to that team.

If an owner team doesn't own records and doesn't have security roles assigned to the team, it can be converted to an access team. It is a one-way conversion. You can't convert the access team back to the owner team. During conversion, all queues and mailboxes associated with the team are deleted. When you create a team in the Web application, you have to choose the team type **Owner**.

More information: Assign a record to a user or team

## Create a team

1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.

   (In Microsoft Dynamics 365 for Outlook, go to **Settings** > **System** > **Security**.)

3. Click **Teams**.

4. On the Actions toolbar, click the **New** button, complete the required fields, and then click **Save**.

   If you don't select the business unit to which the team will belong, by default, the root business unit is selected. The root business unit is the first business unit created for an organization.

## Edit a team

1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Security**.

   (In Dynamics 365 for Outlook, go to **Settings** > **System** > **Security**.)

3. Click **Teams**.

4. In the **Teams** dropdown list, select **All Teams** or another appropriate view.

5. In the grid, select the team you want to edit.

6. On the Actions toolbar, click **Edit**, change the desired fields, and then click **Save**.

## About access teams and team templates

You can create an access team manually by choosing the team type **Access**, or let the system create and manage an access team for you. When you create an access team, you can share multiple records with the team.

A system-managed access team is created for a specific record, other records can't be shared with this team. You have to provide a team template that the system uses to create a team. In this template, you define the entity type and the access rights on the record that are granted to the team members when the team is created.

A team template is displayed on all record forms for the specified entity as a list. When you add the first user to the list, the actual access team for this record is created. You can add and remove members in the team by using this list. The team template applies to the records of the specified entity type and the related entities, according to the cascading rules. To give team members different access on the record, you can provide several team templates, each template specifying different access rights. For example, you can create a team template for the Account entity with the Read access right, which allows the team members to view the specified account. For another team that requires more access to the same account, you can create a team template with Read, Write, Share and other access rights. To be added to the team, a minimum access level a user must have on the entity specified in the template is Basic (User) Read.

Because of the parental relationship between the team template and system-managed access teams, when you delete a template, all teams associated with the template are deleted according to the cascading rules. If you change access rights for the team template, the changes are applied only to the new auto-created (system-managed) access teams. The existing teams are not affected.

> **NOTE**
>
> A user must have sufficient privileges to join an access team. For example, if the access team has the Delete access right on an account, the user must have the Delete privilege on the Account entity to join the team. If you're trying to add a user with insufficient privileges, you'll see this error message: "You can't add the user to the access team because the user doesn't have sufficient privileges on the entity."

For the step-by-step instructions on how to create a team template and add it the entity form, see the article in the Create a team template and add to an entity form

## Maximum settings for system-managed access teams

The maximum number of team templates that you can create for an entity is specified in the `MaxAutoCreatedAccessTeamsPerEntity` deployment setting. The default value is 2. The maximum number of entities that you can enable for auto-created access teams is specified in the `MaxEntitiesEnabledForAutoCreatedAccessTeams` deployment setting. The default value is 5. You can use the `Set-CrmSetting` Windows PowerShell command to update this value.

**See also**

Manage security, users and teams
Create a team template and add to an entity form
About team templates
Print leads, quotes, and other records
Add teams or users to a field security profile

About team templates
Download: Access Teams in Microsoft Dynamics CRM
Download: Scalable security modeling with Microsoft Dynamics CRM
Entity relationship behavior

# About collaborating with team templates

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Using teams in Dynamics 365 is optional, however, teams give you an easy way to share information and collaborate with users across business units. A team is a group of users. As a group, you will be able to track information about the records and perform assigned tasks in much more efficient and coordinated way. While a team belongs to only one business unit, it can include users from other business units. A user can be associated with more than one team.

There are two types of teams that you can work with: *owner* and *access*.

- An owner team owns records and has security roles assigned to the team. The team's privileges are defined by these security roles. In addition to privileges provided by the team's security roles, users have the privileges defined by their individual security roles and by the roles from other teams in which they are members. A team has full access rights on the records that the team owns.
- An access team doesn't own records and doesn't have security roles assigned to the team. The users have privileges defined by their individual security roles and by the roles from other teams in which they are members. The records are shared with an access team and the team members are granted access rights on the records, such as Read, Write, or Append.

An access team can be created manually (user-created) or automatically (system-managed). You can share multiple records with a user-created access team. A system-managed team is created for a specific record and other records can't be shared with this team. For system-managed teams, you have to provide a team template that the system uses to create a team. In this template, you define the entity type and the access rights on the record that are granted to the team members when the team is created. A team template is displayed on all record forms for the specified entity as a list. When you add the first user to the list, the actual access team for this record is created. You can add and remove members in the team using this list. The team template applies to the records of the specified entity type and the related entities, according to the cascading rules. To give team members different access on the record, you can provide several team templates, each template specifying different access rights. For example, you can create a team template for the account entity with the Read access right, which allows the team members to view the specified account. For another team that requires more access to the same account, you can create a team template with Read, Write, Share and other access rights.

Only entities that are enabled for system-managed access teams can be specified in the template.

If you change access rights in the team template, the changes are only applied to new system-managed access teams. The existing teams aren't affected.

For information about how to create a team template, enable an entity for system-managed access teams and how to customize the entity form to add the team template, see Create a team template and add to an entity form.

**See also**

Create a team template and add to an entity form
Manage teams
Access teams in Microsoft Dynamics CRM

# Create a team template to control access rights for automatically created teams

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

A team template can be used for the entities that are enabled for automatically created access teams. In the team template, you have to specify the entity type and the access rights on the entity record. For example, you can create a team template for an account entity and specify the Read, Write, and Share access rights on the account record that the team members are granted when the team is automatically created. After you create a team template, you have to customize the entity main form to include the new team template. After you publish customizations, the access team template is added in all record forms for the specified entity in a form of a list. For example, you created a team template called “Sales team” for the account entity. On all account record forms you’ll see the list called “Sales team”. You can add or remove team members using this list.

## Enable an entity for access teams

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.
2. Go to **Settings** > **Customizations**.
3. In the **Customization** window, choose **Customize the System**.
4. In the navigation pane, expand **Entities**, and then choose the entity you want to use in the team template.
5. On the **Entity Definition** form, in the **Communication & Collaboration** section, select the **Access Teams** checkbox.
6. On the **Actions** toolbar, choose **Save**.

## Create a team template

1. Go to **Settings** > **Security**.
2. Choose **Access Team Templates**.
3. On the **Actions** toolbar, choose **New**, complete the required fields, and then choose **Save**.

## Add a team template to the entity form

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.
2. Go to **Settings** > **Customizations**.
3. In the **Customization** window, choose **Customize the System**.
4. In the navigation pane, expand **Entities**, expand the entity you want to use in the team template, and then choose **Forms**.
5. In **System Forms**, select **Active Forms** > **Main** form.

6. On the **Main** form, open the **Insert** tab.
7. On the ribbon, choose **Sub-Grid**.

   The **Set Properties** dialog box appears.

8. In **Set Properties**, complete the required fields, and then select the **Display label on the Form** check box.
9. In the **Records** drop-down list, select **All Record Types**.
10. In the **Entity** drop-down list, select **Users**.
11. In the **Default View** drop-down list, select **Associated Record Team Members**.
12. In the **Team Template** drop-down list, select the desired template and choose **Set**.

    The team template you selected now appears on the **Main** form.

13. On the **Actions** toolbar, click or tap **Save**, and then choose **Publish**.

### See also

Manage teams
About team templates

# Add teams or users to a field security profile to control access

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Role-based security controls access to a specific entity type, record-based security controls access to individual records, and field-level security controls access to specific fields. You can use a field security profile to manage the permission of users and teams to read, create, or write in secured fields. For example, the System Administrator field security profile gives full access to all secured fields in Dynamics 365.

1. Go to **Settings** > **Security**.
2. Choose **Field Security Profiles**.
3. Choose the profile name that you want to add teams or users to.
4. Under Related, choose **Teams** or **Users**.
5. On the Actions toolbar, choose **Add**.
6. Select a team or user from the list. You can search for a team or user first.
7. Choose **Add**.
8. Close the field security profile record.

**See also**

Control data access
Security concepts for Microsoft Dynamics 365
Manage security, users and teams
Synchronize user information between Microsoft Dynamics 365 and Active Directory

# Synchronize user information with Active Directory

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (on-premises)

Dynamics 365 supports two methods for authenticating users:

- Integrated Windows Authentication
- Claims-based authentication

By default, customers who purchase Dynamics 365 and deploy it on-premises use Windows Authentication. These customers also can set up claims-based authentication for Internet-facing deployments (IFDs) of the product.

With integrated Windows Authentication, each user record in Dynamics 365 must be associated with a user account in Active Directory to enable log on to Dynamics 365. When the user records are associated, Dynamics 365 automatically reads and stores other information about the user record (including the first and last name, the email address, and the globally unique identifier, or GUID) from the Active Directory directory service.

However, changes to the Active Directory information associated with a specific user can create discrepancies with the information maintained in Dynamics 365, thereby preventing the user from accessing Dynamics 365. Specifically, if value of the **User SamAccountName logon** attribute in Active Directory changes for a user, the corresponding user information in Dynamics 365 won't match and the user won't be able log on.

To ensure that the user can successfully log on to Dynamics 365, you must update the information in the Dynamics 365 user record so that it matches the detail in Active Directory.

Before you start, be sure to record the value of the **User SamAccountName logon** attribute for the affected user before updating the corresponding user record in Dynamics 365.

> **NOTE**
> For information about synchronizing Dynamics 365 (online) with Active Directory, see the blog post How to Synchronize CRM Online with your Active Directory.

1. Go to **Settings** > **Security**.
2. Choose **Users**.
3. In the list of users, choose to select the user record you want to update, and then choose **Edit**.
4. In the **User Name** text box, type an Active Directory user name that isn't used by any Dynamics 365 user record.

   > **IMPORTANT**
   > If you specify a user name that already exists in Active Directory, Dynamics 365 will try to map the user to the updated user in Active Directory, and when it locates an existing record with the same GUID, the mapping will fail.

   If all the user accounts in Active Directory are used by Dynamics 365 user records, create a temporary Active Directory user account.
5. Save the user record, and then in the **User Name** text box, type in the **User SamAccountName logon**

value that appears for the user Active Directory, which you recorded prior to starting this procedure.

6. Choose **Save and Close**.

**See also**

Manage security, users and teams
Add or remove territory members

# Add or remove territory members

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To accommodate changes in sales territories or the representatives that are assigned to each territory, you can add or remove territory members in Dynamics 365.

1. Go to **Settings** > **Business Management**.

2. Choose **Sales Territories**.

3. In the list of territories, under **Territory Name**, double-click or tap the entry for the territory you want to add people to or remove people from.

4. In the Navigation Pane, expand **Common** if necessary, and then choose **Members**.

5. Follow the steps for the task you're performing:

   **Add people to a sales territory**

   a. On the ribbon, choose **Add Members**, view the text in the **Message from webpage** dialog box, and then choose **OK** to close the dialog box.

   b. In the **Look Up Records** dialog box, in the **Search** text box, type in the name or a part of the name of the user you want to add to the sales territory, and then choose the **Start search** icon .

   c. In the list of records, select the people you want to add to the sales territory, and then tap or click **Add**.

   **Remove people from a sales territory**

   a. In the list of members, select the people you want to remove from the sales territory, and then on the ribbon, choose **Remove Members**.

   b. In the **Remove Members** dialog box, choose **Remove**.

   > **NOTE**
   > When you remove someone from a sales territory, the updated list of members isn't displayed until you refresh the page.

### See also

Manage users
Manage security, users and teams

# Troubleshooting: User needs read-write access

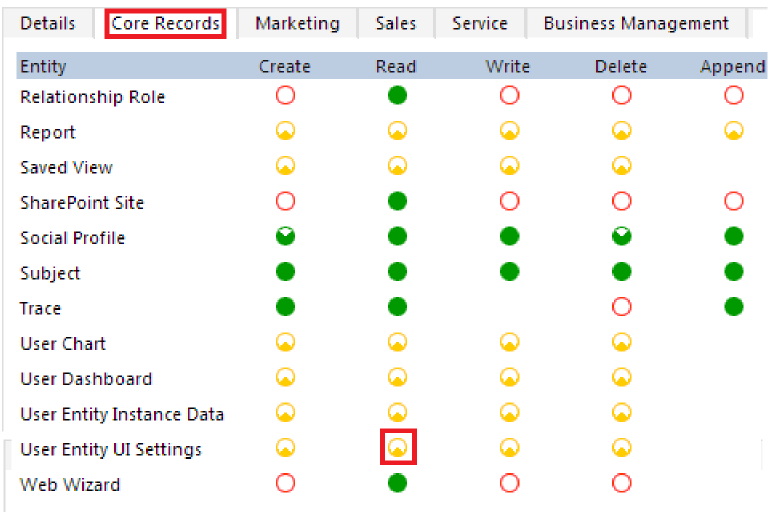
8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You don't have sufficient permissions to access Dynamics 365. A Dynamics 365 system administrator will need to do the following in the Dynamics 365 application:

1. Go to **Settings** > **Security**.
2. Choose **Users**.
3. Open the user record.
4. Choose **More Commands** (•••) > **Manage Roles**.
5. Make note of the role assigned to the user. If appropriate, select a different security role. Close the Manage User Roles dialog box.
6. Choose **Security** > **Security Roles**.
7. Choose the security role from step 4.
8. Choose **Core Records**.
9. Confirm that the **Read** permission for **User Entity UI Settings** is set to the User level (a yellow circle with a wedge-shaped segment).

   If the security role is missing this permission, the system administrator will need to change this setting by clicking or tapping on it.




> **NOTE**
>
> If you have multiple security roles assigned, confirm that at least one assigned role has the User Entity UI Settings privilege set to the User level.

**See also**

Manage security, users and teams

# Manage instances

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You manage your Dynamics 365 (online) instances from the Dynamics 365 admin center.

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

2. Choose **Admin** > **Dynamics 365**

This section provides information on how you add or edit instances of a Dynamics 365 (online) subscription and set up additional non-production (Sandbox) instances.

**See also**

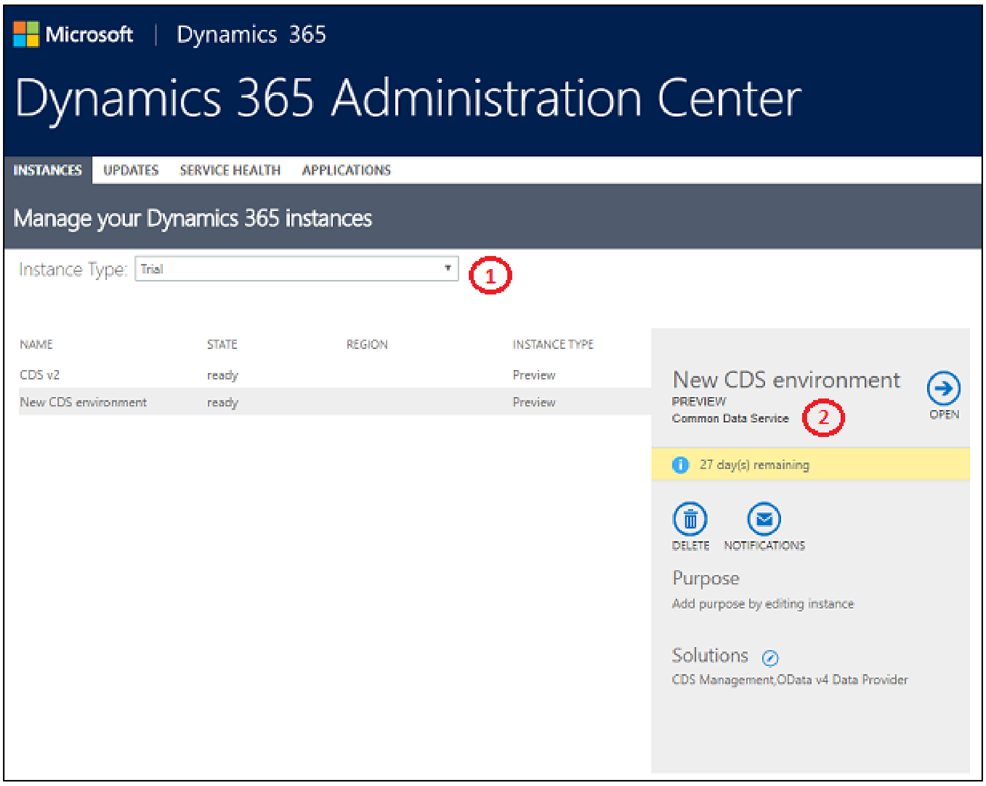
Terminology used in the product and documentation

# What's new for instance management

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You might have noticed some changes to the Dynamics 365 admin center. On March 21, 2018, we introduced the following:




1. **Instance type picker**. Filter on the type of instance: Trial, Production, Sandbox.
2. **Common Data Service instance**. PowerApps Environments provisioned with Common Data Service in the PowerApps admin center are now displayed in the Dynamics 365 admin center as Common Data Service instances.

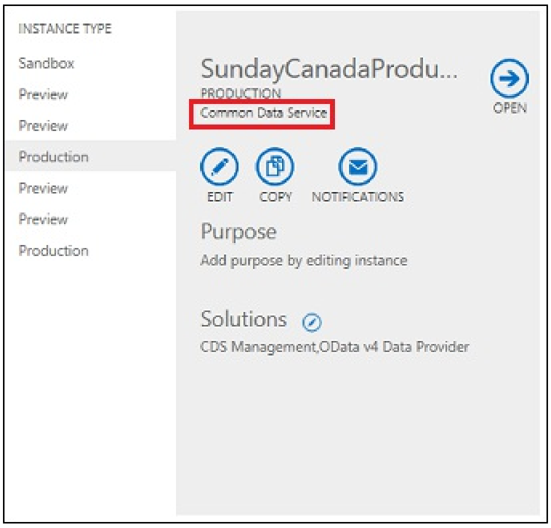
## Filter by instance type

If you're a large organization, you might have numerous instances of various types such as Production and Sandbox. You can now filter for instance type to show only the type you're interested in.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select an instance type to display instances for that type only.

## Common Data Service instance

Once you create Environments provisioned with Common Data Services in the PowerApps admin center, they will now show up as Common Data Service instances in your Dynamics 365 admin center.




For more information, see Manage Common Data Service instances.

### See also

Administer PowerApps overview
Introduction to the admin center for PowerApps

# Manage Sandbox instances

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

A Sandbox instance is any non-production instance of Dynamics 365 (online). Isolated from production, a Sandbox instance is the place to safely develop and test application changes with low risk.

**NOTE**

With December 2016 Update for Dynamics 365 (online), we no longer require a minimum purchase amount to receive a free Sandbox instance. If you've purchased a subscription and have not received a free Sandbox instance, you will be provided one when you purchase full Dynamics 365 Enterprise licenses. There is a limit of one free Sandbox instance per tenant. You can also purchase additional Sandbox instances. For more information, see Dynamics 365 pricing and licensing.

Check out Switch an instance for information on how to switch an instance to or from Sandbox and for licensing considerations.

**TIP**

Check out the following video: Sandbox instances for Dynamics 365 (3:18).

## View your Sandbox instances

You manage your Sandbox instances from the Dynamics 365 admin center.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.

   On the **Manage your Dynamics 365 instances** page, you'll see a list of all your instances.

## Reset a Sandbox instance

You can reset a Sandbox instance to delete and re-provision it. Consider a reset when you want to:

- Change to a different version of Dynamics 365 (online).
- Create a new project
- Free up storage space
- Remove an instance containing Personally Identifiable Information (PII) data

**NOTE**

- You can only reset Sandbox instances.
- Check out the following video: Dynamics CRM 2013 Spring '14 Online New Features -Reset.

  This video also applies to CRM Online 2015 Update 1 and Dynamics CRM Online 2016 Update.

**An example scenario**

Thomas is looking at the storage consumed by the various Contoso instances and is getting concerned that they'll run out of space in one of their production instances. He'd like to free up some space so he can give the production instance some additional storage. He's also been notified that the Legal department has set a retention policy on the use of production data in the test environment.

After contacting Isaac, Thomas resets the Sales department's complete Sandbox instance. The instance is re-provisioned to factory settings and ready for future use as a Sandbox instance for a future project.

**To reset an instance**

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select a Sandbox instance, and then click **Reset**.
5. On the **reset instance** page, adjust the instance settings as needed and then click **Reset**.

   **WARNING**

   The Sandbox instance will be deleted and reset to factory settings. You will not be able to recover any deleted data.

6. Click **yes** in the confirmation dialog box.

# Administration mode

When you place a Sandbox instance in administration mode only users with Dynamics 365 System Administrator or System Customizer security roles will be able to sign in to that instance. Administration mode is useful when you want to make operational changes and not have regular users affect your work, and not have your work affect regular users.

**NOTE**

- You can only place Sandbox instances in administration mode.
- Processes that use code, such as plug-ins or custom workflow assemblies, continue to be processed by the Dynamics 365 platform when administration mode is enabled and background operations are disabled.
- Check out the following video: Dynamics CRM 2013 Spring '14 Online New Features -Admin Mode.

  This video also applies to CRM Online 2015 Update 1 and Dynamics CRM Online 2016 Update.

On the **admin settings** page, you can set the following.

| SETTING | DESCRIPTION |
| --- | --- |
| Enable administration mode | Select to enable administration mode for the selected Sandbox instance. Only System Administrators or System Customizers will be able to sign in to the selected Sandbox instance. |
| Disable background operations | Select to disable all asynchronous operations (see Asynchronous service architecture) such as workflows and synchronization with Exchange. Emails will not be sent and server-side synchronization for appointments, contacts, and tasks are disabled. **Note:** Administration mode must be enabled to disable background operations. |
| Custom message for end users | Enter a message that will be displayed to all users when they attempt to sign in. |

### Set administration mode

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

2. Click **Admin centers** > **Dynamics 365**.

3. Choose the **Instances** tab.

4. Select a Sandbox instance, and then click **Admin**.

5. Select **Enable administration mode** to enable it, and then click **Save**.

### See also

Blog: Introducing Sandbox Instances in CRM Online
Switch an instance
Delete an instance
Copy an instance

# Add an instance to your subscription

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can add production and non-production (Sandbox) instances to a Dynamics 365 (online) subscription. Each new instance creates a separate organization that can be used by different departments, locations, or for non-production purposes such as development. For more information on the instance types available to you, see Microsoft Dynamics 365 pricing and licensing.

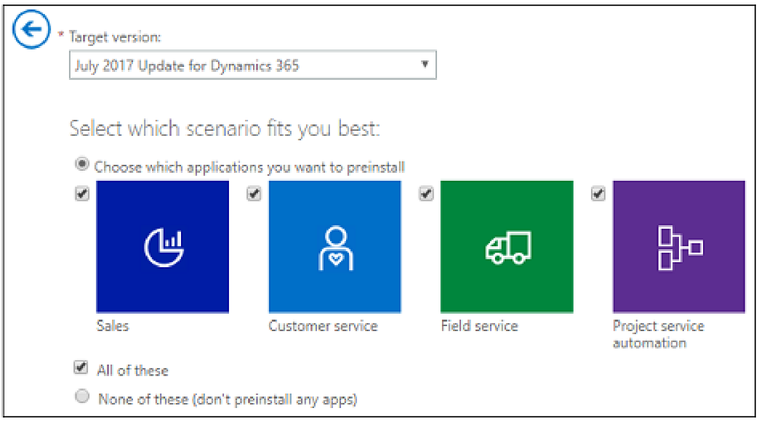
Purchase the Dynamics 365 (online) instance on the Microsoft online services portal Purchase subscriptions page. Additional storage and instances can be purchased by customers who have a paid Dynamics 365 (online) Professional user license subscription.

You must have the Office 365 Global administrator to do these tasks. For more information, see Assigning administrator roles.

## What information do I need to create an instance?

When you add an instance, you can accept the default values, or enter different values to create a Dynamics 365 (online) instance.

- **Select which scenario fits you best**. The apps you can choose depend on the licenses you've purchased. If you haven't purchased any Dynamics 365 licenses, you'll only see **None of these (don't preinstall any apps)**.




- **Name**. This is typically the name of your organization and is displayed in the Dynamics 365 application.

- **URL**. The URL is used to construct the URL for users to sign-in to the Dynamics 365 application. Therefore, we recommend that you limit the length of URL name to reduce the overall length of the URL.

- **Purpose**. This value is used to associate the instance with a specific intent and is only displayed in the instance picker, which is accessed through the Dynamics 365 admin center. For example, if this instance is for exclusive use by your sales and marketing departments you can enter *Contoso Sales and Marketing* or if the instance is for development and for testing purposes enter a relevant name such as *Contoso Development*.

- **Security Group**. This value is used to determine the Microsoft Online Services security group that includes the users who will have access to this instance of Dynamics 365 (online). For more information, see Control user access to instances: security groups and licenses.

> **IMPORTANT**
> If you do not specify a security group, all users associated with the subscription who have a Dynamics 365 (online) license will be added to the new instance.

- **Country/Region**. You can specify a region for the instance.

> **NOTE**
> To request the ability to create Dynamics 365 (online) instances (production and non-production) in more than one geographical region, please contact your account manager or Technical Support.

- **Currency**. When you add an instance, you must select a base currency before the instance is provisioned. Although you can add currencies in the Dynamics 365 application, only the base currency will be used for reporting.

> **WARNING**
> Once set, the base currency cannot be changed.

## Add an additional instance

The following steps apply to customers who do not purchase using volume licensing. Volume license customers should see: Microsoft Volume Licensing Service Center.

**Step 1: Purchase the additional instance**

1. Sign in to the Office 365 admin center as an Office 365 Global administrator. In the navigation pane, click **Billing** > **Purchase Services**.

2. Scroll down to the **Add-on subscriptions** section, and then hover over **Microsoft Dynamics 365 (online) Additional Non-production Instance** or **Microsoft Dynamics 365 (online) Additional Production Instance**, and then click **Buy now**.

3. Proceed through the screens to purchase additional instances.

   For more information, see Microsoft Dynamics 365 pricing and licensing.

> **TIP**
> Close your Dynamics 365 (online) browser session and open a new session to force an update to the **Manage all Dynamics 365 (online) instances** page.

**Step 2: Configure the additional instance**

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

2. Click **Admin centers** > **Dynamics 365**.

3. Choose the **Instances** tab.

4. Select the instance that you want to configure, and then click **Configure**.

> **TIP**
>
> If the instance does not appear in the list or is in a state other than **ready to configure**, wait a few minutes and then try again. Or, close your Dynamics 365 (online) browser session and open a new session to force an update to the **Manage all Dynamics 365 (online) instances** page.
>
> You cannot start a new Dynamics 365 (online) instance until you click **Configure** and complete the configuration process.
>
> Dynamics 365 (online) instances will not come prepared with sample data when configured by an Office 365 Global administrator who does not have a Dynamics 365 (online) license. Sample data may be added later, after the instance is configured and ready to use, by a Dynamics 365 (online) licensed user who has the Dynamics 365 System administrator security role. For more information, see Add or remove sample data.

5. On the **configure new instance** page, enter your settings, and then click **Next**.

6. On the **Confirm some details** page, verify that the country/region and currency displayed are correct. Although you can add currencies in the Dynamics 365 application, only the base currency will be used for reporting.

   > **WARNING**
   >
   > After a base currency is selected it cannot be changed.

   After you have verified that the base currency is correct, click **Finish**.

7. Once your instance is set up, make note of the URL and click or tap it to launch Dynamics 365 (online). Prepare the instance for users by assigning security roles, creating teams, customizing, and importing data. More information: Getting Started.

## What is the effect of an additional instance on storage?

When you add a new Dynamics 365 (online) instance, the new instance and any existing instances will consume the existing storage that is available to the account. Warnings will be communicated when storage is near capacity.

## Control user access to instances: security groups and licenses

If your company has multiple Dynamics 365 (online) instances, you can use security groups to control which licensed users can be a member of a particular instance.

Consider the following example scenario:

| INSTANCE | SECURITY GROUP | PURPOSE |
| --- | --- | --- |
| Coho Winery Sales | Sales_SG | Provide access to the organization that creates sales opportunities, handles quotes, and closes deals. |
| Coho Winery Marketing | Marketing_SG | Provide access to the organization that drives marketing efforts through marketing campaigns and advertising. |
| Coho Winery Service | Marketing_SG | Provide access to the organization that processes customer cases. |

| INSTANCE | SECURITY GROUP | PURPOSE |
|---|---|---|
| Coho Winery Dev | Developer_SG | Provide access to the Sandbox instance used for development and testing. |

In this example, four security groups provide controlled access to a specific organization.

Note the following about security groups:

- When users are added to the security group, they are added to the Dynamics 365 instance.
- When users are removed from the group, they are disabled in the Dynamics 365 instance.
- When a security group is associated with an existing instance with users, all users in the instance that are not members of the group will be disabled.
- If a Dynamics 365 instance does not have an associated security group, all users with a Dynamics 365 license will be created as users and enabled in the instance.
- If a security group is associated with an instance, only users with Dynamics 365 licenses that are members of the instance security group will be created as users in the Dynamics 365 instance.
- When you remove a security group that is associated with a Dynamics 365 (online) instance, either by editing the instance and removing the security group or by deleting the security group, Dynamics 365 (online) licensed users who were members of the security group will have the same access to Dynamics 365 (online).
- When you assign a security group to an instance, that instance will not show up in the **Instances** tab (instance picker) in the Dynamics 365 admin center for users not in the group.
- If you do not assign a security group to an instance, the instance will show up in the **Instances** tab (instance picker) in the Dynamics 365 admin center even for those who have not been assigned a security role in that Dynamics 365 instance.
- You cannot make security groups members of other security groups.

> **NOTE**
> All licensed users, whether or not they are members of the security groups, must be assigned Dynamics 365 security roles to access Dynamics 365 (online). You assign the Dynamics 365 security roles in the Dynamics 365 (online) web application. Users can't access instances of Dynamics 365 (online) until they are assigned at least one security role for that instance. More information: Grant users access to Microsoft Dynamics 365 (online).

### Create a security group and add members to the security group

1. Sign in to the Office 365 admin center.
2. Click **Groups** > **Groups**.
3. Click **+ Add a group**.
4. Change the type to **Security group**, add the group **Name** and **Description**. Click **Add** > **Close**.
5. Click the group you created, and then next to **Members**, click **Edit**.
6. Click **+ Add members**. Select the users to add to the security group, and then click **Save** > **Close** several times to return to the **Groups** list.
7. To remove a user from the security group, select the security group, next to **Members**, click **Edit**. Click **- Remove members**, and then click **X** for each member you want to remove.

> **NOTE**
>
> If the users you want to add to the security group are not created, create the users and assign to them the Dynamics 365 (online) licenses.
>
> To add multiple users, see: bulk add users to Office365 groups.

**Create a user and assign license**

1. In the Office 365 Admin Center, click **Users** > **Active users** > **+ Add a user**. Enter the user information, select licenses, and then click **Add**.

   More information: Add users individually to Office 365 - Admin Help

**Associate a security group with a Dynamics 365 instance**

1. In the Office 365 Admin Center, click **Admin centers** > **Dynamics 365**.
2. Click the **Instances** tab, select an instance, and then click **Edit**.
3. In **security settings**, search for a specific security group, and then click **Next** > **Save**.

> **TIP**
>
> To force an immediate synchronization between the Office 365 admin portal and Dynamics 365 (online), do the following:
>
> - Sign out of Dynamics 365 (online) and the Office 365 admin portal.
> - Close all open browsers used for Dynamics 365 (online) and the Office 365 admin portal.
> - Sign back in to Dynamics 365 (online) and the Office 365 admin portal.

**See also**

Edit properties of an instance
Manage Dynamics 365 (online) Sandbox instances
Grant users access to Microsoft Dynamics 365 (online)
Manage subscriptions, licenses, and user accounts

# Switch an instance

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You may decide that your customization work developed and tested on a Sandbox instance is now ready to go live. If you've placed your Sandbox instance in administration mode, only users with Dynamics 365 System Administrator or System Customizer security roles are able to sign in to that instance. Once you switch the instance type to Production, all your users can access your Dynamics 365 organization. When you configure or edit an instance, you can switch the instance from:

- Production to Sandbox
- Sandbox to Production

Switching an instance does not change the number of your purchased licenses. Review the **License considerations** section for how switching can impact license allocation.

## Switch an instance

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select the instance that you want, and then click **Edit**. If this is a new instance, click **Configure**.
5. Under **Instance type**, choose the instance type and then click **Next**.
6. Review the settings and then click **Save**.

## License considerations

Review the following table to see how switching an instance type is impacted by your Dynamics 365 (online) licenses.

| SCENARIO | RESULT | NOTES |
| --- | --- | --- |
| Switch a Production instance to Sandbox. You have unused Sandbox licenses. | A Sandbox license is used. | Sandbox instances have special features such as Reset and Administration modes. See Manage Dynamics 365 (online) Sandbox instances. |
| Switch a Production instance to Sandbox. You do not have any unused Sandbox licenses. You have unused Production licenses. | A Production license is used. | Sandbox instances have special features such as Reset and Administration modes. See Manage Dynamics 365 (online) Sandbox instances. |
| Switch a Production instance to Sandbox. You do not have any unused Sandbox or Production licenses. | The Production instance is not changed. You need to purchase a Sandbox instance. | Sandbox instances have special features such as Reset and Administration modes. See Manage Dynamics 365 (online) Sandbox instances. |

| SCENARIO | RESULT | NOTES |
|---|---|---|
| Switch a Sandbox instance to Production. You have unused Production licenses. | A Production license is used. A Sandbox instance becomes available. | |
| Switch a Sandbox instance to Production. You do not have any unused Production licenses. | You will need to purchase a Production license. | See Add an instance to your subscription. |

### See also

Manage Microsoft Dynamics 365 (online) instances
Manage Dynamics 365 (online) Sandbox instances
Add an instance to your subscription

# Copy an instance to a Sandbox instance

8/24/2018 • 6 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use Copy instance in the Dynamics 365 admin center to copy the Dynamics 365 application and all data from any instance to a Sandbox instance. You can do either a full or minimal copy.

> **TIP**
> Check out the following video on copying an instance to a Sandbox instance: Microsoft Dynamics CRM 2013 Spring '14 Online New Features -Copy.
>
> This video also applies to CRM Online 2015 Update 1 and Dynamics CRM Online 2016 Update.

> **NOTE**
> To copy instances larger than 100 GB, please contact technical support.

## Full copy instance

A full copy includes all application data, users, and customizations from the source instance and is suitable for:

- User acceptance testing
- Upgrade testing
- Preview in production (TAP/EA)
- Training

**An example scenario**

Isaac, a business application developer, has received a request from the sales department to configure and deploy a social media integration solution from another company vendor. Isaac has never installed a solution from this vendor and is unsure what impact this would have on the production application. He'd like to import the solution into an environment that is nearly identical to, but isolated from, production to learn about the solution and make the appropriate configuration changes. Isaac submits a request to Thomas, the IT Manager for Contoso, to create a full copy Sandbox instance for him.

After the full copy is complete, Isaac receives a mail from Thomas telling him the Sandbox instance is ready. Isaac logs into the Sandbox instance and makes the necessary changes to make sure that production external services will not be impacted by the Sandbox instance. Once changes are complete, Isaac turns off administration mode and enables background services. Isaac is able to use the full copy Sandbox instance to do his testing and later manually import the solution into production.

## Minimal copy instance

A Minimal copy only includes users, customizations, and schema from the source instance and is suitable for:

- Iterative team development

- Partner/ISV solutions
- Proof of concept

**An example scenario**

Isaac has a large development project starting next week for the sales department. He has a team of developers ready to start on the project, some of whom are internal to Contoso and some are external vendors. The Contoso sales application contains Personally Identifiable Information (PII) that the sales manager has explicitly stated must not be made available to any external parties for privacy and legal liability reasons. Isaac requests a minimal copy Sandbox instance that does not contain any production data or users. In addition, Isaac creates an Office 365 security group to give the development team access to the Sandbox instance.

After modifying and enabling some of the plug-ins, the developer Sandbox instance functions the same and is completely isolated from the production application. The development team works on their modifications in this instance for several weeks. They package their changes into a solution and export/import to deploy to the full copy Sandbox instance. After a successful round of testing and signoffs, the changes are manually deployed to production.

**Entities copied in a Minimal copy**

The following entities are copied when you do a Minimal copy:

| ENTITIES |
| --- |
| BusinessUnit |
| ConnectionRole |
| Currency |
| DuplicateRule |
| DuplicateRuleCondition |
| EmailServerProfile |
| FieldPermission |
| FieldSecurityProfile |
| ImportMap |
| InternalAddress |
| Mailbox |
| Organization |
| Position |
| Report |
| Resource |

| ENTITIES |
| --- |
| ResourceGroup |
| Role |
| RollupField |
| SavedQuery |
| SLAKPIInstance |
| Solution |
| Subject |
| Team |
| TeamTemplate |
| Template |
| SystemUser |

## To copy an instance

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

   > **NOTE**
   > Global administrators can copy all available instances. Dynamics 365 System administrators can copy instances for which they have the System administrator role.

2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select an instance, and then click **Copy**.
5. On the **copy instance** page, select a target instance, a copy type, adjust the instance settings as needed, and then click **Copy**.

   A target instance can be a Sandbox or Preview instance; not a Production instance.

   > **WARNING**
   > The target instance will be deleted and replaced with a copy of the data and customizations from the source instance. You won't be able to recover any deleted data.

6. Click **yes** in the confirmation dialog box.

Once the copy process is complete, the target instance is placed in Administration mode and background operations are disabled. The next section describes recommended Administrator actions for the newly created copy (target) instance.

# Next steps after copying an instance

To ensure the newly created copy (target) instance does not impact your production instance, once the copy operation is complete, two things happen:

1. The newly created copy instance is placed in administration mode. Only those with Dynamics 365 System Administrator or System Customizer security roles can sign in and manage the copy instance. Regular Dynamics 365 users cannot sign in and use the copy instance.

2. Background operations are disabled in the copy instance. Disabled operations include workflows and synchronization with Microsoft Exchange.

**Review components**

You should review the status of application components in the copy instance with external connections such as Yammer, email, plug-ins, custom workflow activities, etc. Review these and consider what action to take:

1. Disable the component.

2. Redirect the component to another service instance such as one running Exchange or SharePoint.

3. Do nothing – leave the component as is in the copy instance. For example, you might decide to allow Yammer posting to both the copy and production instances.

   Here are some possible application components in the copy instance that could have external connections and therefore could impact services with the same connections in your production instance.

- **Email**. A mailbox cannot be synced with two different instances. For a full copy instance, the user mailboxes in the copy instance must be disabled so the mailboxes do not attempt to send or receive email, or track appointments, contacts, or tasks. Set synchronization for the following to None.

  - Incoming Email

  - Outgoing Email

  - Appointments, Contacts, Tasks

  More information: Set the delivery method for incoming and outgoing email

- **SharePoint**. Deactivate or redirect SharePoint to a sandbox SharePoint environment to prevent impacting documents in Dynamics 365 managed by SharePoint. In Dynamics 365, go to **Settings** > **Documentation Management** > **SharePoint Sites**. Select your site, and then click **Deactivate**.

- **Yammer**. Disable Yammer or redirect to a separate Yammer service to prevent posts made in the copy instance conflicting with posts made in the production instance. In Dynamics 365, go to **Settings** > **Administration** > **Yammer Configuration**.

  After creating a new Sandbox instance, workflows and system jobs might be pending execution. Apart from these jobs, if you have connected Yammer to Dynamics 365 there will be Yammer activity streams posted from Dynamics 365 to Yammer asynchronously. These activity streams are not visible through the system jobs. If there were any pending Yammer activity streams before the Disable Background Process is turned on, these activity steams will be posted to the current Yammer configuration once the Disable Background Process is turned back off. In the Sandbox instance, if you have your current Yammer configuration connected to the same Yammer network as your production environment, you might see duplicate activity streams. To avoid duplicate Yammer activity streams, redirect your Sandbox instance to another Yammer network (possibly a test network) before turning background processes back on.

- **Platform extensibility**. Consider disabling the following that could be running in the copy instance and impacting external service components.

- **Server-side plug-ins**.
- **Workflow custom activity**.

- **Client extensibility**. Review the following.
  - **Client-side JavaScript**. Take a look at your JavaScript and HTML web resources for read/write operations that could impact external services.
  - **IFRAMES**. Determine if the target of an IFRAME is a production instance.

**See also**

Introducing Sandbox Instances in CRM Online
Manage Dynamics 365 (online) Sandbox instances
Manage Microsoft Dynamics 365 (online) instances

# Delete an instance

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can delete Dynamics 365 (online) Sandbox instances to recover the licenses and storage space or to prevent them from being used by mistake. In order to delete a production instance, you must first switch to a Sandbox instance and then delete the Sandbox instance. You can delete a Support instance directly.

## Delete an instance

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select the instance that you want, and then click **Delete**.

> **WARNING**
> Your data will be lost! Be sure you've selected the correct instance.

5. Click **Confirm** to delete the instance.

Deleting an instance doesn't change the number of your licenses purchased. For example, say you have two instances - one Sandbox and one production - and you decide to delete your Sandbox instance. After the delete has successfully completed, you'll see one production instance and one instance to configure in the **Instance** tab of the **Manage your Dynamics 365 updates** page.

### See also

Manage Microsoft Dynamics 365 (online) instances
Switch an instance

# Backup and restore instances

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

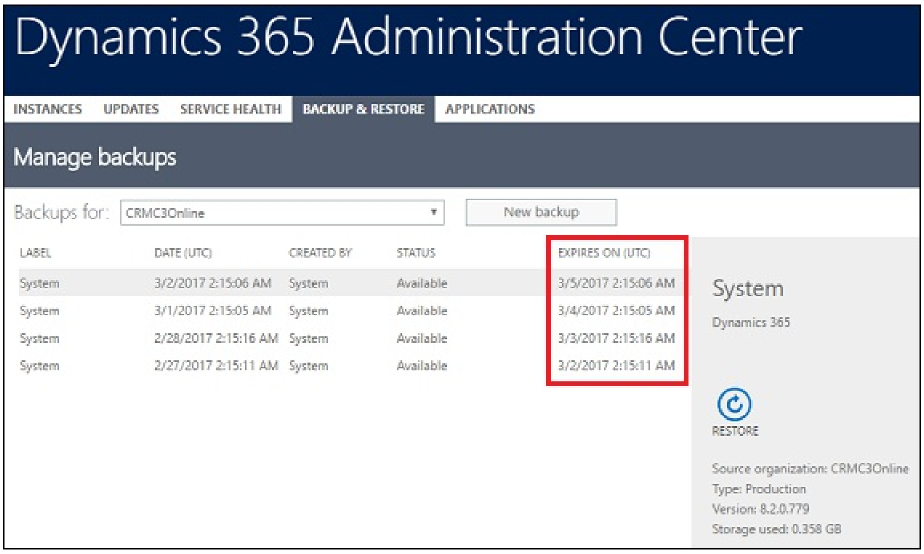
Protecting your Dynamics 365 data and providing continuous availability of service is important for you and for us. You have multiple options for backing up and restoring your Dynamics 365 (online) instances.

## Daily system backups

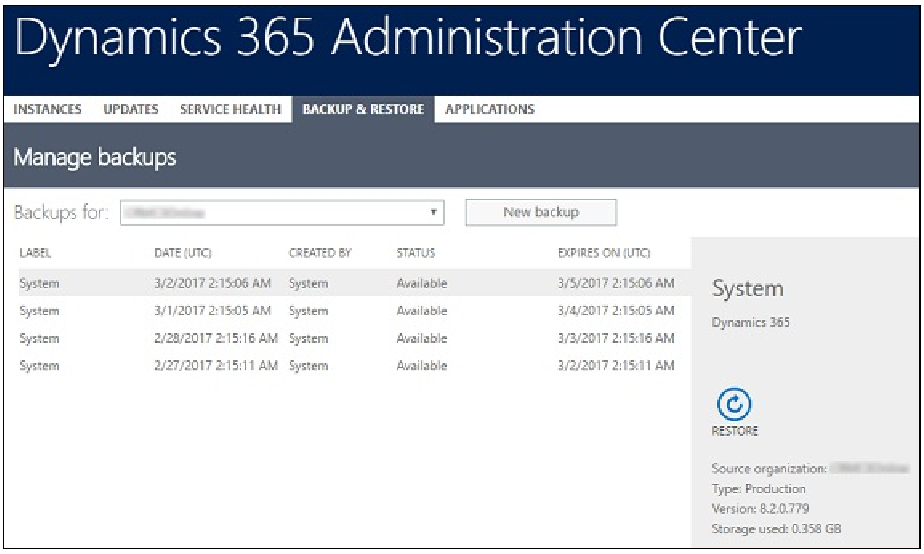
Good news! Some backups take place without you having to do anything.

About Dynamics 365 (online) **system backups**:

- All your instances are backed up.
- System backups occur daily.
- System backups are retained up to three days. Check your expiration date.




- System backups do not count against your storage limits.
- System backups are identified as created by **System** on the **Manage backups** page.




**See your system backups**

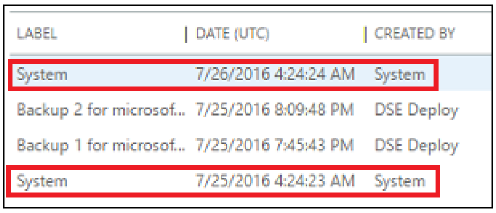
1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.

2. Click **Admin centers** > **Dynamics 365**.

3. Click the **Backup & Restore** tab.

4. Choose an instance from the **Backups for** drop-down list.

   System-created backups appear under **Created By** as **System**.




# On-demand backup: Dynamics 365 managed

Automated system backups are great, but you will want to be able to make your own backups before making some significant customization change or applying a version update. You can do this with on-demand Dynamics 365 managed backups.

> **NOTE**
>
> A backup is created for you when we update your instance.

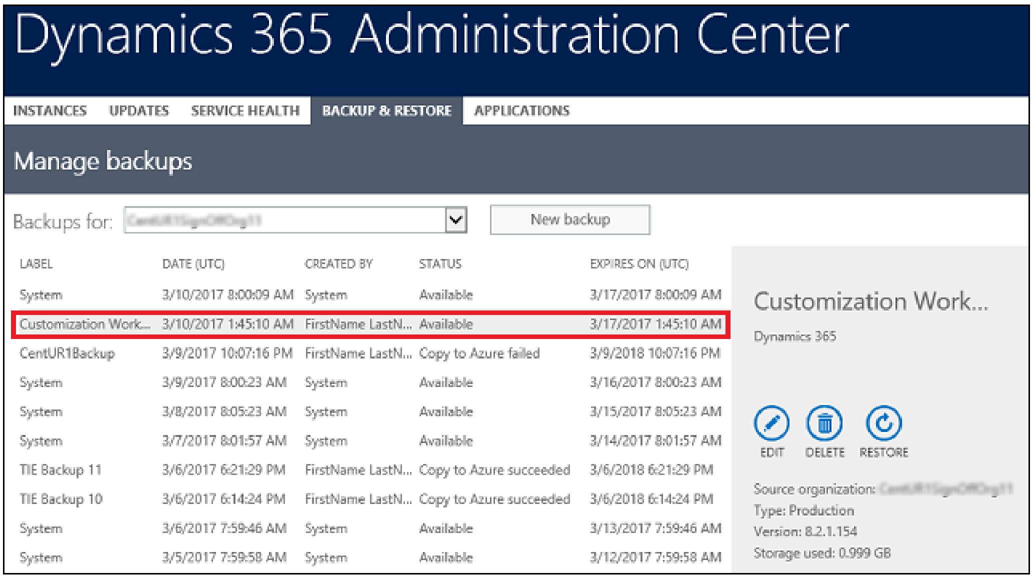
About Dynamics 365 managed **on-demand backups**:

- You can back up Production and Sandbox instances.

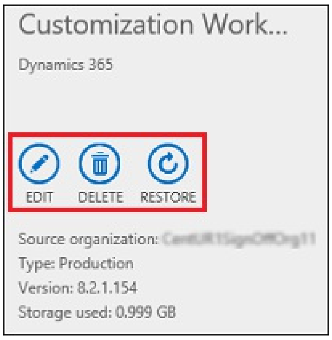
- **You can only restore to a Sandbox instance**. To restore to a Production instance, first switch it to a Sandbox instance. See Switch an instance.

- Only CRM Online 2016 Update 1 or later versions are supported for backup.

- On-demand backups are retained for up to three days. Check your expiration date.

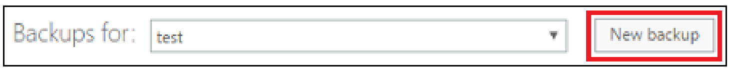



- You are not limited in the number of on-demand backups you can make.
- On-demand backups do not count against your storage limits.
- On-demand backups are identified by having a label you created and by the presence of **Edit** | **Delete** | **Restore** in the details section. System backups have only **Restore**.

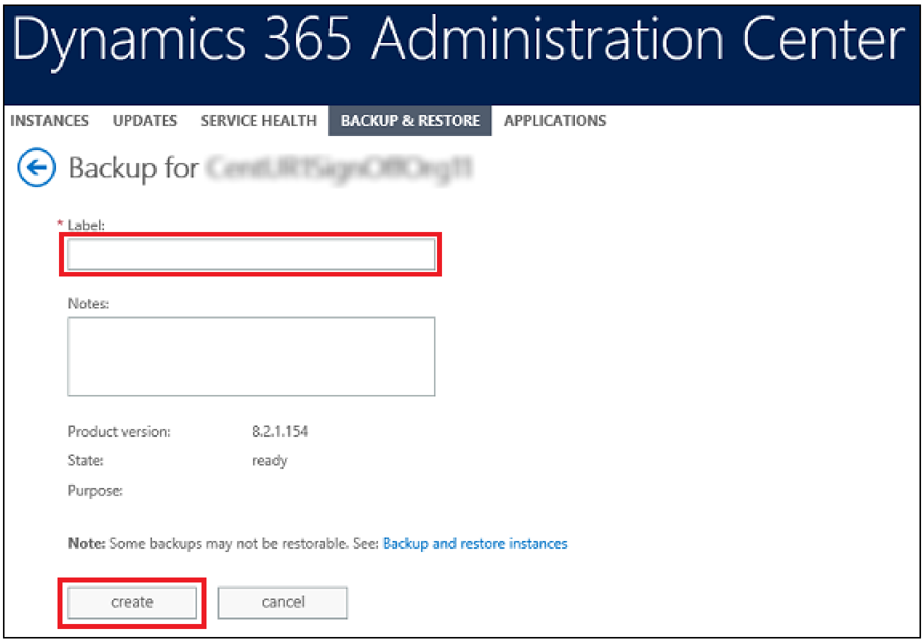



**Create an on-demand backup of a Dynamics 365 instance**

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.
2. Click **Admin centers** > **Dynamics 365**.
3. Click the **Backup & Restore** tab.
4. Choose an instance from the **Backups for** drop-down list.
5. Click **New backup**.




6. Type a label and any notes to help identify this backup for future restoration.
7. Click **Create**.




A notification will be displayed to confirm the backup is being created. The status column in the list provides the status of the backup.

> **NOTE**
> The instance remains available while being backed up.

### Edit a Dynamics 365 on-demand backup

Edit a backup to change its label and your notes about the backup.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.

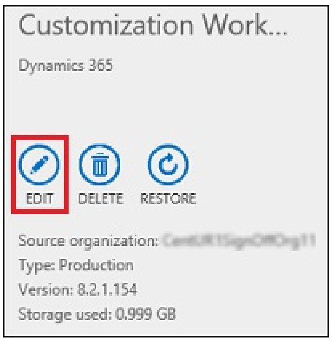
2. Click **Admin centers** > **Dynamics 365**.

3. Click the **Backup and Restore** tab.

4. Choose an instance from the **Backups for** drop-down list.

5. Choose an on-demand backup from the list of backups.

6. Click **Edit**.




7. Change the information as needed, and then click **Save**.

### Restore a Dynamics 365 on-demand backup

You can only restore to Sandbox instances. To restore to a Production instance, first switch it to a Sandbox instance, restore to it, and then switch it back to a Production instance. See Switch an instance.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You

can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.

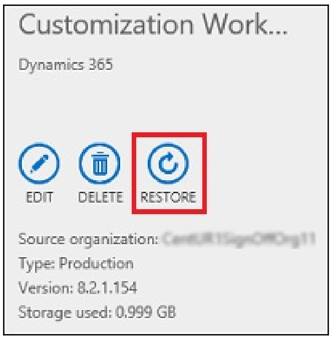
2. Click **Admin centers** > **Dynamics 365**.

3. Click the **Backup and Restore** tab.

4. Choose an instance from the **Backups for** drop-down list.

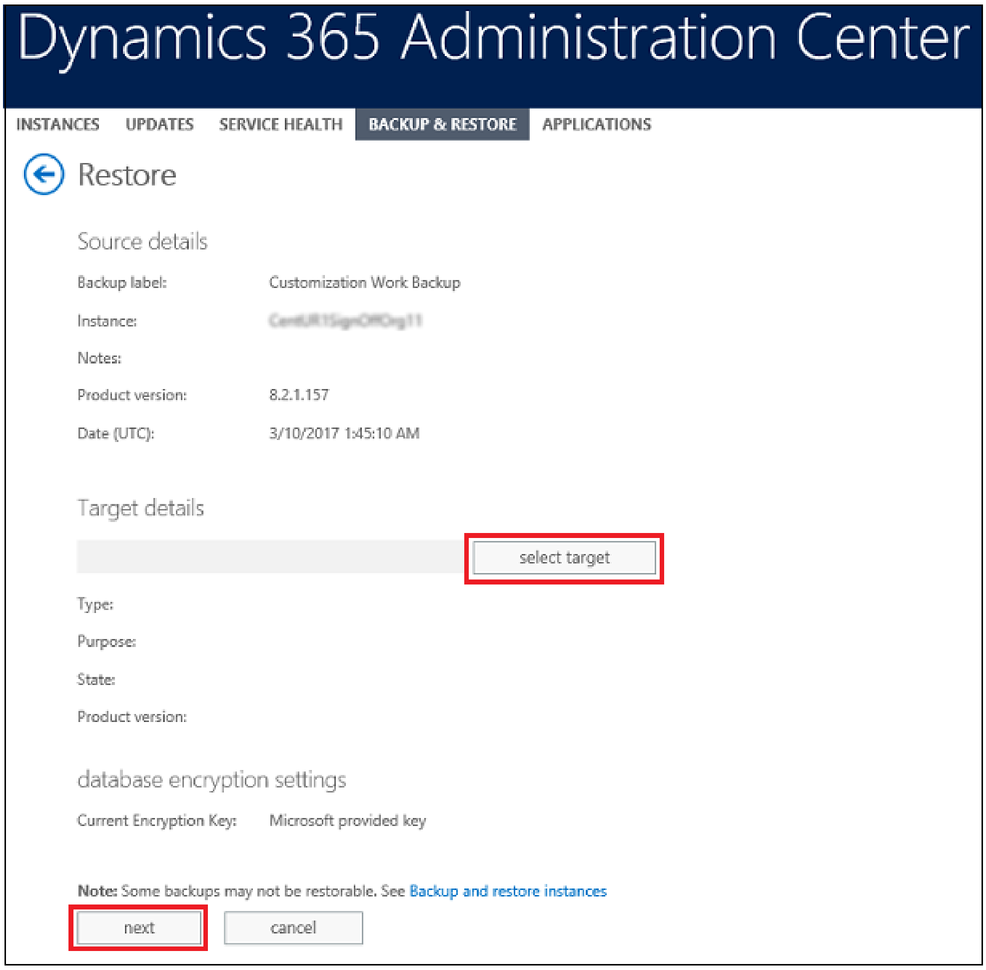
5. Choose an on demand backup from the list of backups.

6. Click **Restore**.




7. Click **Select target** to pick a target instance.

8. Click **Next**. Verify the details, and then click **Restore**.



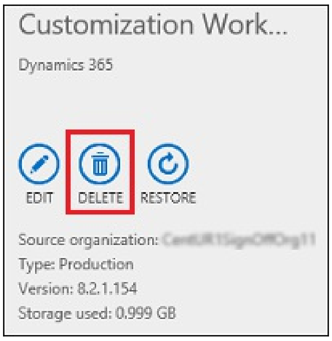

A notification will be displayed confirming that the backup is being restored. It can take some time for the restoration to complete.

> **NOTE**
> The instance remains unavailable while being restored.

### Delete a Dynamics 365 on-demand backup

You can use the Dynamics 365 admin center to delete Dynamics 365-managed, on-demand backups. You can't delete system backups.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.
2. Click **Admin centers** > **Dynamics 365**.
3. Click the **Backup & Restore** tab.
4. Choose an instance from the **Backups for** drop-down list.
5. Choose an on-demand backup from the list of backups.
6. Click **Delete**.

7. Click **Confirm**.

### See also

Switch an instance

# Manage Support instances

8/24/2018 • 2 minutes to read • Edit Online

A Support instance is any non-production instance of Dynamics 365 (online) used by Microsoft Support to reproduce and resolve customer issues. When there is an issue affecting the operation of your online service, Microsoft can create a Support instance in your tenant to troubleshoot and repair the issue. It is isolated from your production instance so it does not impact your business operations. Dynamics 365 System admins have full control of managing and providing organization data by copying it to a Support instance.

**What is a Support instance?**

- It is an instance created in your tenant by Microsoft for purposes of preventing, detecting, or repairing problems affecting the operation of your online service.
- It does not require any additional non-production instance to be purchased.
- The database size of a Support instance does not count towards your storage limit.
- It resides in the same regional datacenter as your source instance.

**What data is in a Support instance?**

- When a Support instance is initially created by Microsoft, it contains no customer data or customizations.
- System admins manage Support instances in the Dynamics 365 admin center.
- System admins can copy an instance to a Support instance, and then choose whether to provide a Minimal or a Full copy of their instance.
- System admins must consent to providing a copy of their data to Microsoft.

**Who has access to a Support instance?**

Minimal copy:

- Microsoft staff who are members of a support security group

Full copy:

- Microsoft staff who are members of an elevated support security group

**What kind of data access does Microsoft have?**

Online (via the application):

- System admin privileges

Database (via SQL query tools):

- Read/Write access to all tables
- Access to the database requires additional approval by Microsoft and it is managed, controlled, and granted as needed.
- Access to the database is time limited (for example, 30 minutes) and expires automatically.

**How long does a Support instance stay in your tenant?**

1. 14 days or upon resolution of the problem.
2. System admins can delete the Support instance at any time.

**Is access and usage of Support instance audited?**

Yes.

# Tenant to tenant migration

10/22/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 8.x

## Move an instance to a different tenant

You can use the Tenant to Tenant Migration feature for Dynamics 365 (online) to request to have an instance in one tenant moved to another tenant. To do so, contact technical support and submit a support request.

There are no user-interface changes or version changes as part of this move. You can move one or multiple Dynamics 365 (online) instances. Once complete, your Dynamics 365 (online) instance(s) will appear in your new tenant.

> **IMPORTANT**
> When moving individual Dynamics 365 (online) instances from one tenant to another, if that requires a geographical region change, your tenant becomes a multiregional tenant. Regional features are enabled in the Dynamics 365 admin center.
>
> You might need to reconfigure some applications and settings after tenant to tenant migration such as Microsoft Dynamics 365 for Outlook, server-side sync, SharePoint integration, etc.
>
> Dynamics 365 (online) version 9.0 does not currently support tenant to tenant migration. Check back later for availability.

## Impact of migrating between tenants

When your organization is moved from one tenant to another, the URL does not need to change, as the source instance will be deleted after the move.

In order to perform this operation, you'll need to provide some information, such as:

- What is the source tenant domain and its region? (example: EMEA, NA, APAC)
- What is the destination tenant domain and its region? (example: EMEA, NA, APAC)
- Does the destination tenant have a valid Dynamics 365 subscription?
- Does the destination tenant have enough available user licenses?
- Does the destination tenant have enough Dynamics 365 instance licenses?
- Does the destination tenant have enough Dynamics 365 storage available for the instances being migrated?

If you do not have a Dynamics 365 subscription and/or trial in the destination tenant, then you will need to create one. You might need to purchase a new Dynamics 365 subscription in the destination tenant (or convert a trial to paid), if not already done.

You will need to create a temporary instance or instances in the destination tenant, depending on how many source instances you are migrating. Source instance type and destination instance type must match (production vs non-production (Sandbox)). These instances should also be version 8.2.2 or below. The users to be migrated from one tenant to another need to be created on the target tenant as well.

The destination tenant needs an equal or higher number of active user licenses, Dynamics 365 instance licenses for the instances being migrated, and equal or greater storage as the source tenant.

## How the move works

You'll be provided with a list of prerequisites and post-requisites for your migration as part of the support request raised. The following table describes what Microsoft does before, during, and after your move.

| | BEFORE THE MOVE<br>NOTIFICATION | DURING THE MOVE<br>CUT-OVER | AFTER THE MOVE<br>NOTIFICATION AND SUPPORT |
|---|---|---|---|
| **What Microsoft does** | Your support representative or Account Manager will work with you to request a move and schedule it. | Cut-over for the migration takes several hours, depending on the number of users and the amount of data. During this period, the organization is not accessible, so the cut-over should be scheduled during the evening or over a weekend.<br><br>There is a step that will require your involvement, which is to provide a Dynamics 365 User Mapping File. This is requested in advance so that we can validate the users being moved before the migration takes place. | You will be alerted by email or telephone when your instance is migrated to the new tenant.<br><br>After the tenant migration is complete, your support representative or Account Manager will assist you to contact with billing to cancel and/or credit your previous subscription, if needed. |

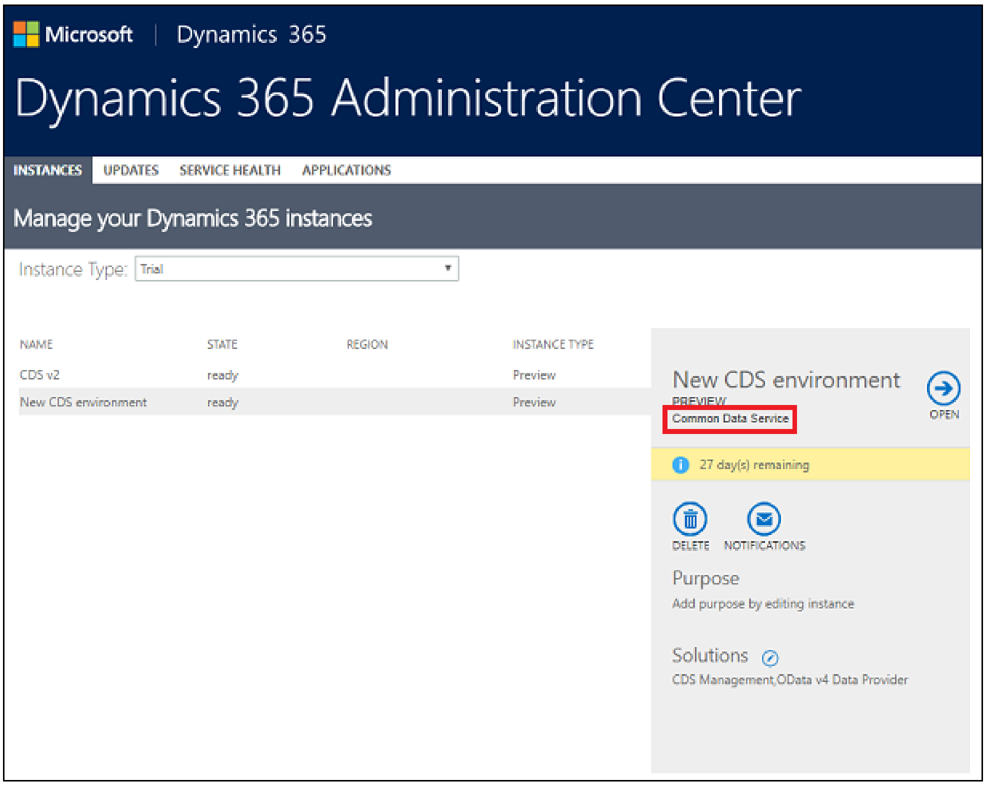
We will adhere to the terms of the Microsoft Online Services Service Level Agreement for all moves.

# Common Data Service instances

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The Common Data Service allows you to securely store and manage data used in your PowerApps environments. As of March 21, 2018, PowerApps environments provisioned with a Common Data Service database are displayed as instances in the Dynamics 365 admin center. There you can view and do some management of your Common Data Service instances.




## Identify Common Data Service instances

1. In the Dynamics 365 admin center, select the **Instances** tab.
2. Select an instance and look for **Common Data Service** in the description details.

## Manage Common Data Service instances

Currently, Common Data Service instances are available as trial and production types. What management actions are available depends on which admin center you use.

**Management in the Dynamics 365 admin center**

You can manage the following with the Common Data Service instance in the Dynamics 365 admin center:

- Open an instance
- Edit an instance
- Copy an instance
- Delete an instance
- Change notifications

**Management in the PowerApps admin center**

You can manage the following with the Common Data Service instance in the PowerApps admin center:

- Add or remove a user or group from either the Environment Admin or Environment Maker role. For more information, see Environment Administration.
- Provision a Common Data Service database for the environment. For more information, see Create a Common Data Service database.
- Set Data Loss Prevention policies. For more information, see Data loss prevention policies.
- Set database security policies (as open or restricted by database roles). For more information, see Configure database security.
- Members of the Azure AD tenant Global administrator role (includes Office 365 Global admins) can also manage all environments that have been created in their tenant and set tenant-wide policies from the PowerApps admin center.

# More information

Administer PowerApps overview
Introduction to the admin center for PowerApps

# Edit properties of an instance

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Administrators can edit properties of a Dynamics 365 (online) instance, such as the friendly name, URL, and the purpose. However, instances that are being provisioned cannot be edited, and disabled instances must be enabled before they can be edited.

## Edit an instance

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

2. Click **Admin centers** > **Dynamics 365**.

3. Choose the **Instances** tab.

4. Select the instance that you want, and then click **Edit**.

5. Select any of the following field values that you want to change.

   - **Name**. This is typically the name of your organization and is displayed in the Dynamics 365 application. After you save the change, it may take up to 5 minutes for the friendly name to appear in the application.

   - **URL**. The URL is used to construct the URL for users to sign in to Dynamics 365. We recommend that you limit the length of the URL name to reduce the overall length of the URL.

     > **WARNING**
     > There are important tasks that you must communicate to your Dynamics 365 (online) users immediately following a URL name change.
     >
     > - For users of the web application, send information that includes the new URL with instructions about how to bookmark it.
     > - For users of Dynamics 365 for Outlook Online, the following two tasks must be completed in the order specified here:
     >   a. **Synchronize offline data**. Dynamics 365 for Outlook users connected to this instance who work offline must synchronize by using the previous URL. If you run the Configuration Wizard and change the URL before completing this step, offline data may be lost.
     >   b. **Run the Configuration Wizard**. After a URL name change is saved and any offline data is synchronized, users of Dynamics 365 for Outlook must run the Configuration Wizard to update the URL.

     After a URL name change is saved, all users who access that instance must be notified of the change. Users will be able to access the instance for up to 24 hours by using the previous URL. After the 24-hour period has passed, the previous URL will not work.

     Notice that interim URL names are discarded when there are multiple changes within 24 hours. For example, consider the following situation:

     - The original URL of your instance is *fourthcoffeesales.crm.dynamics.com*.

- Using the instance picker, you change the URL name from *fourthcoffeesales.crm.dynamics.com* to *fourthcoffeemktg.crm.dynamics.com*.
- Within 24 hours of the URL name change, you change the URL name again, this time from *fourthcoffeemktg.crm.dynamics.com* to *fourthcoffeesalesandmktg.crm.dynamics.com*.

  In this situation, the first URL name change to *fourthcoffeemktg.crm.dynamics.com* will be immediately removed from the system. The new URL, *fourthcoffeesalesandmktg.crm.dynamics.com*, will become active. Additionally, the original URL, *fourthcoffeesales.crm.dynamics.com*, will be active for up to 24 hours.

- **Purpose**. This value is used to associate the instance with a specific intent and is only displayed in the **Manage all Dynamics 365 (online) instances** page, which is accessed through the Dynamics 365 admin center. For example, if this instance is for exclusive use by your sales and marketing departments, you can enter *Contoso Sales and Marketing* or, if the instance is for development and testing, enter a relevant name such as *Contoso Development*.
- **Security Group**. This value is used to determine the security group that includes the users who will have access to this instance of Dynamics 365 (online). Learn more: Control user access to instances: security groups and licenses

  > **IMPORTANT**
  > If you do not specify a security group, all users who have a Dynamics 365 (online) license will be added to this instance.

6. Click **Save**.

**See also**

Add an instance to your subscription
Switch an instance
Manage Dynamics 365 (online) Sandbox instances
Manage subscriptions, licenses, and user accounts
Manage storage for Microsoft Dynamics 365 (online) User session and access management

# About multiple online instances or tenants

8/24/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 (online) gives you options for segregating your Dynamics 365 data and user access. For most companies, adding and using multiple instances in your subscription provides the right mix of functionality and ease of management. Enterprises with separate geographic locations might consider using multiple tenants to separate Dynamics 365 (online) licenses. Multiple instances can share users among instances; multiple tenants cannot.

> **NOTE**
> The concept and operation of tenants and instances, though similar, differs between online and on-premises deployments of Dynamics 365. This topic is for those administering Dynamics 365 (online) deployments.

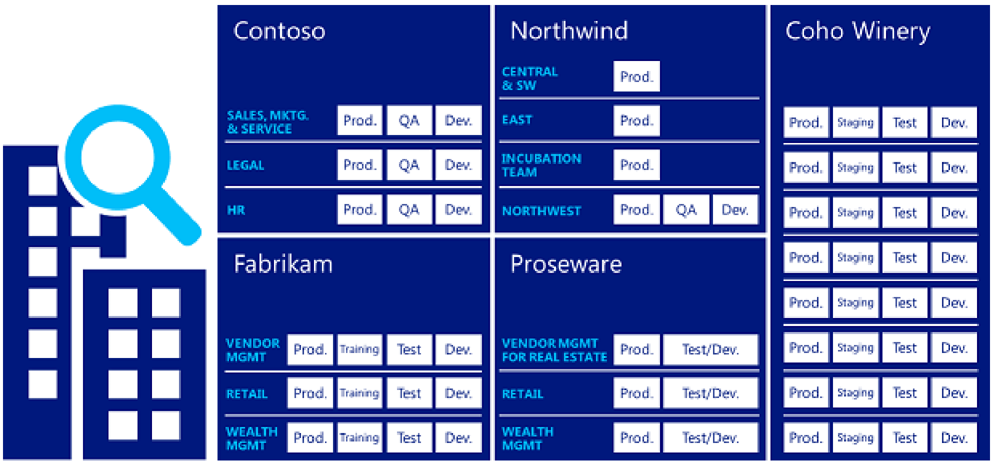
## Terminology

| TERM | DEFINITION |
|---|---|
| Tenant | For Dynamics 365 (online), a tenant is the account you create in the Microsoft Online Services environment when you sign up for a Dynamics 365 (online) subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple Dynamics 365 (online) instances.<br><br>The tenant created for you has a domain name of <account>.onmicrosoft.com. For example, contoso.onmicrosoft.com. |
| Instance | When you sign up for a trial or purchase a Dynamics 365 (online) subscription, a Dynamics 365 (online) production instance is created. Each additional production or non-production (Sandbox) Dynamics 365 (online) instance you add creates a separate and isolated Dynamics 365 organization on the same tenant.<br><br>An instance has the URL format: https://<URL name>.crm.dynamics.com. For example, https://contososales.crm.dynamics.com. |
| Multiregional instance | An instance in a different region than where your Dynamics 365 (online) tenant resides. Local instances can provide quicker data access for users in that region. More information: Add and edit multiregional instances |

| TERM | DEFINITION |
|---|---|
| Subscription | A subscription consists of the Dynamics 365 licenses and add-ons included with the trial or paid service you signed up for in your Dynamics 365 (online) account. Dynamics 365 subscriptions can vary in license type, price, and end date.<br><br>For example, a subscription might be 100 licenses of Dynamics 365 (online) Professional and 10 licenses of Dynamics 365 (online) Enterprise. |
| Identity | The user account used to sign in to Dynamics 365 (online). You can also use this identity to access other Microsoft Online services, such as Office 365 or SharePoint Online. Administrators can decide if they want to federate user identity management between Dynamics 365 (online) and on-premises Active Directory. |
| User account | A user account assigned by an organization (work, school, non-profit) to one of their constituents (an employee, student, customer) that provides sign-in access to one or more of the organization's Microsoft cloud service subscriptions, such as Exchange Online or Dynamics 365 (online). Access to an online service is controlled by the license assigned to the user account.<br><br>User accounts are stored in an organization's cloud directory within Azure Active Directory, and are typically deleted when the user leaves the organization. Organizational accounts differ from Microsoft accounts in that they are created and managed by admins in the organization, not by the user. |
| Security group | If your company has multiple Dynamics 365 (online) instances, you can use instance security groups to control which licensed users can access a particular instance. More information: [Control user access to instances: security groups and licenses](#) |

# Uses for multiple instances

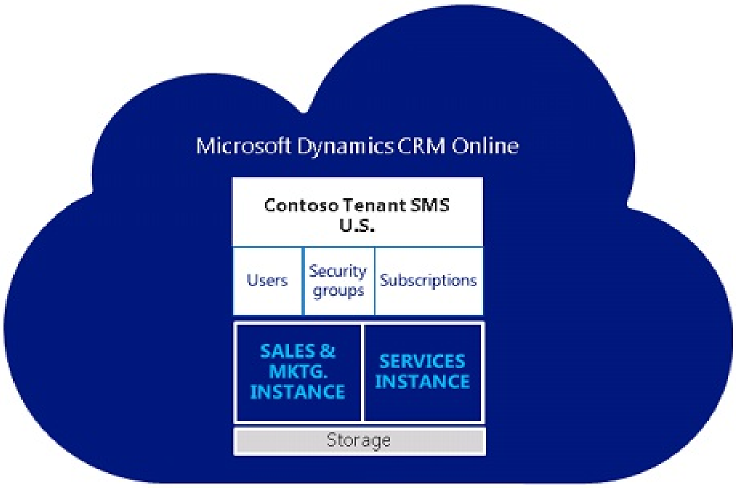
Dynamics 365 (online) instances are similar in concept to a high-rise business complex with floors organized according to business functions. Consider each floor within the building as an application (Sales/Service/Marketing, Vendor management, Wealth management) and consider each unit within a floor as an instance for a specific purpose such as Production, Training, Testing, and Development.




Multiple instances are needed when segregation is required of plugins, workflows, or admin resources that cannot be easily isolated by using business units in Dynamics 365.

## A multi-instance deployment

A typical Dynamics 365 (online) deployment includes one tenant only. A tenant can include one or more Dynamics 365 (online) instances; however, a Dynamics 365 (online) instance is always associated with a single tenant.




This example uses two instances for three teams: Sales, Marketing, and Services.

Sales and Marketing share an instance so lead information can be easily accessed by both. Services has its own instance so tickets and warranties can be managed separately from campaigns and other sales related events.

You can provide access to one or both instances easily. Sales and Marketing users could be limited to their instance while Service users with extended access could update support escalations records related to accounts in both instances.

About single tenant with multiple instances:

- A tenant can include up to 50 Dynamics 365 (online) production instances and up to 75 non-production (Sandbox) instances.
- Each instance within the tenant receives its own SQL database.
- Dynamics 365 data is not shared across instances.
- Storage is shared across the primary instance and any additional instances.
- All instances for a single customer tenant will be set up in the geography where they initially signed up for their account. Storage consumption is totaled and tracked across all the instances attached to a customer tenant.
- You can set up separate security groups for all instances.
- A licensed Dynamics 365 (online) user can potentially access all the Dynamics 365 (online) instances associated with the tenant. Access is controlled by instance security group membership.
- You can purchase additional instances through the Additional Instance Add-On. Additional instances can be added only to "paid" subscriptions - not trials or Internal Use Rights (IUR). If you purchased your Dynamics 365 (online) subscription through Volume Licensing, you must go through your Large Account Reseller (LAR) to purchase the additional instance. More information: [Billing and subscription support]
- You can’t merge existing trials or subscriptions onto an additional instance; instead, you will need to move your data and customizations.

## Why use multiple instances?

The following are common use cases for multi-instance deployment. Consider these examples when you decide the deployment type that best fits your company's requirements.

**Master data management**

In this scenario, a "master" data set provides for change management through a central master data source. This approach requires that the central master data be synchronized to all instances so that each instance has access to the latest version of the core information. Requested changes to the information can be made directly within the master system. Alternatively, users can explicitly access the master system or capture the changes in the local instance, with those changes subsequently passed on to the master instance.

Requiring that changes be made centrally can provide for centralized change control. For example, anti-fraud checks can be performed to ensure that changes are made only by a central team and not by local teams that might otherwise benefit from a change, such as a change in credit limits. This would provide a second level of change authorization and verification that avoids the ability for a single person or a group of people who work closely together to collaborate to affect a fraud. Pushing a request to a different, independent team can provide protection against potential fraud.

**Security and privacy**

Differences in regional, for example European Union (EU), or national legislation can result in variations in requirements for securing data or maintaining data privacy across the different regions or countries in a deployment. In some cases, legislative/regulatory restrictions make it illegal to host data outside the borders of a country or region, and addressing this challenge is particularly critical in specific business sectors.

For example, consider healthcare sector restrictions on sharing patient information. Some EU regulations require that any health information that is collected about people residing in the EU be maintained and shared only within EU boundaries, while similar data collected about people in the United States (US) is kept within US boundaries. Also consider banking sector restrictions on sharing customer information. In Switzerland, for example, regulations make it illegal to share customer information outside of their national boundaries.

**Scalability**

While a single instance of Dynamics 365 can scale up and out to support the growth of a customer's business, with very high data volumes or levels of complexity, there are additional considerations. For example, in environments with extreme volumes and/or extensive use of Service Scheduling, scaling up SQL Server can require complicated and expensive infrastructure that is prohibitively expensive or extremely difficult to manage.

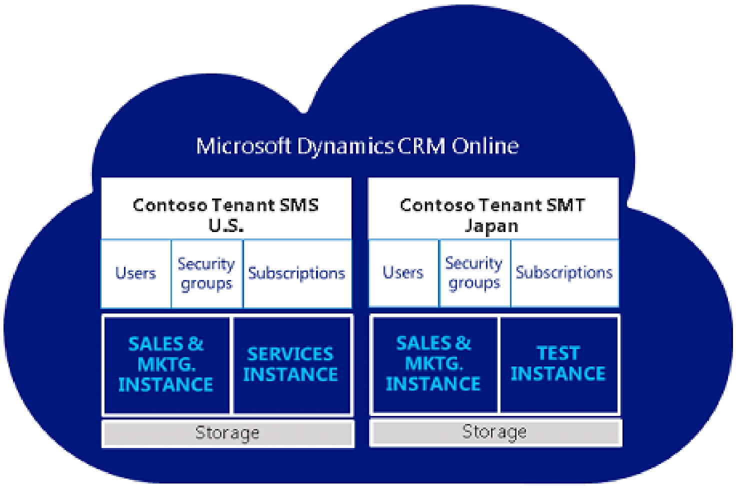
There are many scenarios in which there is a natural functional split in capability requirements. In such cases, delegating workloads by creating scale-out scenarios that are based on these functional splits can provide for higher volumes by using commodity infrastructure.

## Add an instance to your subscription

For information about how to add an instance to your Dynamics 365 (online) subscription, see Add an instance to your subscription.

## A multi-tenant deployment

Global businesses with regional or country models that differ can use tenants to account for variations in approach, market size, or compliance with legal and regulatory constraints.




This example includes a second tenant for Contoso Japan.

User accounts, identities, security groups, subscriptions, licenses, and storage cannot be shared among tenants. All tenants can have multiple instances associated with each specific tenant. Dynamics 365 data is not shared across instances or tenants.

About multiple tenants:

- In a multi-tenant scenario, a licensed Dynamics 365 (online) user associated with a tenant can only access one or more Dynamics 365 (online) instances mapped to the same tenant. To access another tenant a user would need a separate license and a unique set of sign-in credentials for that tenant.

  For example, if User A has an account to access Tenant A their license allows them to access any and all instances created within Tenant A - if they are allowed by their administrator. If User A needs to access instances within Tenant B, they will need an additional Dynamics 365 (online) license.

- Each tenant will require a tenant administrator(s) with unique sign-in credentials, and each tenant affiliate will manage its tenant separately in the administrator console.

- Multiple instances within a tenant are visible from the Dynamics 365 (online) interface if the administrator has access.

- You cannot reassign licenses between tenant enrollments. An enrolled affiliate can use license reduction under one enrollment and add licenses to another enrollment to facilitate this.

- On-premises Active Directory federation cannot be established with more than one tenant unless you have top-level domains that you need to federate with different tenants (for example Contoso.com and Fabricam.com).

## Why use multiple tenants?

**Functional localization**

This scenario typically arises in organizations with overlapping but separate functional needs. Some common examples include:

- Organizations with different business divisions, each with a different market or model of operation.

- Global businesses with regional or country models that differ to account for variations in approach, market size, or compliance with legal and regulatory constraints.

  In these types of business environments, an organization often will have common sets of functionality that allow specific regions, countries, or business areas with a degree of localization regarding:

- Information capture. For example, capturing the ZIP Code in the United States would correlate to capturing the Post Code in the United Kingdom.

- Forms, workflows.

**Physical distribution**

For business solutions that must support users that are physically distributed over large distances, particularly for global deployments, using a single instance may not be suitable because of the implications (such as WAN latency) associated with the infrastructure over which the users connect, which can significantly impact the user experience. Distributing instances to provide users with more local access can reduce or overcome WAN-related issues, as the access occurs over shorter network connections.

## Add a multi-tenant deployment under volume licensing

For a multi-tenant deployment, you'll need a Multi-Tenant Amendment. A Multi-Tenant Amendment is an actual amendment to the Volume License agreement used to purchase licenses. Contact your Microsoft Sales Representative or Reseller to obtain the amendment.

## Constraints of multi-tenants

Admins who want to deploy and manage multiple tenants should be aware of the following:

- User accounts, identities, security groups, subscriptions, licenses, and storage cannot be shared among tenants.
- A single domain can only be federated with one tenant.
- Each tenant must have its own namespace; UPN or SMTP namespaces cannot be shared across tenants.
- If an on-premises Exchange organization exists, you cannot split this organization across multiple tenants.
- A consolidated Global Address List will not be available, except if explicitly managed downstream from the synchronization.
- Cross-tenant collaboration will be limited to Lync Federation and Exchange Federation features.
- SharePoint access across tenants may not be possible. While this may be solved with Partner Access, the user experience is disrupted and licensing aspects apply.
- There can be no duplicate accounts across the tenants or partitions in the on-premises Active Directory.

**See also**

Manage Microsoft Dynamics 365 (online) instances
Using multi-tenancy in Microsoft Dynamics CRM 2013 to address challenges in enterprise business environments (primarily on-premises)
Blog: Dynamics CRM and multi-tenancy (on-premises)

# Add and edit multiregional instances

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

For multinational companies with employees and customers distributed around the world, you can create and manage Dynamics 365 (online) instances specific to your global regions. You can create an instance in a different region than where your Dynamics 365 (online) tenant resides. Local instances can provide quicker data access for users in that region. Be sure to read A multi-instance deployment to understand the features of multiple instances.

Purchase the Dynamics 365 (online) instance on the Purchase subscriptions page. You must have an active Dynamics 365 (online) account to complete the purchase. Additional storage and instances can be purchased by customers who have a paid Dynamics 365 (online) Professional or Dynamics 365 (online) Enterprise subscription.

You must have an Office 365 Global administrator or Dynamics 365 (online) System administrator role to do these tasks. For more information, see Assigning admin roles.

> **NOTE**
>
> To request the ability to create Dynamics 365 (online) instances (production and non-production) in more than one geographical region, please contact your account manager or Technical Support.

## What information do I need to create an instance?

During the initial configuration an instance, you can accept the default values, or enter different values to create a Dynamics 365 (online) instance.

- **Region**. Choose from the following: Asia Pacific (APAC); Canada (CAN); Europe, Middle-East, Africa (EMEA); India (IND); Japan (JPN); North America (NA); Oceania (OCE); South America (LATAM/SAM).

  > **TIP**
  >
  > To view the current data centers for your region, see Where is my data?

- **Name**. This is typically the name of your organization and is displayed in the Dynamics 365 (online) application.

- **URL**. The URL name is used to construct the URL for users to sign-in to the Dynamics 365 application. Therefore, we recommend that you limit the length of URL name to reduce the overall length of the URL.

- **Purpose**. This value is used to associate the instance with a specific intent and is only displayed in the instance picker. For example, if this instance is for exclusive use by your sales and marketing departments you can enter *Contoso Sales and Marketing* or if the instance is for development and for testing purposes enter a relevant name such as *Contoso Development*.

- **Instance Security Group**. This value is used to determine the Microsoft Online Services security group that includes the users who will have access to this instance of Dynamics 365 (online). For more information, see Control user access to instances: security groups and licenses.

> **IMPORTANT**
>
> If you do not specify a security group, all users associated with the subscription who have a Dynamics 365 (online) license will be added to the new instance.

- **Organizational language**. This language will be used for the Dynamics 365 (online) application.
- **Base currency**. When you add an instance, you must select a base currency before the instance is provisioned. Although you can add currencies in the Dynamics 365 application, only the base currency will be used for reporting.

  > **WARNING**
  >
  > Once set, the base currency cannot be changed.

## Create a regional instance

The following steps apply to customers who do not purchase using volume licensing. Volume license customers should see: Microsoft Volume Licensing Service Center.

**Step 1: Purchase the additional instance**

1. Global administrators sign in to the Office 365 admin center, and then, in the navigation pane, click **Billing** > **Purchase services**.
2. Scroll down to the **Add-on subscriptions** section, and then hover over **Microsoft Dynamics 365 (online) Additional Non-production Instance** or **Microsoft Dynamics 365 (online) Additional Production Instance**, and then click **Buy now**.
3. Proceed through the screens to purchase additional instances.

   You can choose to add production or non-production (Sandbox) instances. For more information, see Microsoft Dynamics 365 pricing and licensing.

**Step 2: Configure the additional instance for a region**

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Instances** tab.
4. Select the instance that you want to configure, and then click **Configure**.

   > **IMPORTANT**
   >
   > If the instance does not appear in the list or is in a state other than **ready to configure**, wait a few minutes and then try again.
   >
   > You cannot start a new Dynamics 365 (online) instance until you click **Configure** and complete the configuration process.
   >
   > Dynamics 365 (online) instances will not come prepared with sample data when configured by a Global administrator who does not have a Dynamics 365 (online) license. Sample data may be added later, after the instance is configured and ready to use, by a Dynamics 365 (online) licensed user who has the Dynamics 365 system administrator security role. For more information, see Add or remove sample data.

5. On the **configure new instance** page, select a region for the instance.

6. Enter the rest of your settings, including choosing a currency, and then click **Next**.

> **IMPORTANT**
>
> After a base currency is selected it cannot be changed.
>
> Although you can add currencies in the Dynamics 365 application, only the base currency will be used for reporting. To select a different currency, click **Change currency** and select a different one or specify a custom currency.

7. On the confirmation page, verify that the settings are correct and then click **Configure**.

8. On the **Your Microsoft Dynamics 365 organization is ready** page, click **Launch Dynamics 365 (online)** to start Dynamics 365 (online) to prepare the instance for users such as assign security roles, create teams, customize, and import data. More information: Getting started.

> **TIP**
>
> Note the Dynamics 365 (online) instance URL that is displayed on the page. You can use this URL to directly access the Dynamics 365 (online) instance.

# Configure and manage a regional instance

To configure and manage a regional instance, you must first select your active region to be the same as the regional instance.

### Select a regional instance to configure and manage

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

2. Click **Admin centers** > **Dynamics 365**.

3. Choose the **Instances** tab.

4. From the drop-down list, select the region of the regional instance to configure. For example, to edit an instance in Japan, select the APAC region.

> **NOTE**
>
> If you don't see the **Your current region is:** drop-down list, you don't have any instances outside of your current region.

5. Select the instance that you want to configure, and then click **Configure**.

   The **Edit**, **Copy**, and **Reset** buttons appear when you've selected a regional instance matching your active region.

> **NOTE**
>
> - Copied instances are copied to the same region as the source instance.
> - Instances that are reset are reset to the current region.

### See also

Edit properties of an instance
Manage Dynamics 365 (online) Sandbox instances
Manage Microsoft Dynamics 365 (online) instances

Differences between the Microsoft Online services environment administrative roles and Dynamics 365 (online) security roles

Grant users access to Microsoft Dynamics 365 (online) as a Microsoft Online service

Manage subscriptions, licenses, and user accounts

# Migrate Microsoft Dynamics 365 (online) to Microsoft Dynamics 365 (on-premises)

8/24/2018 • 9 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 8.x

This document describes the steps needed to migrate from an instance of Dynamics 365 (online) to a Microsoft Dynamics 365 on-premises deployment. To complete the migration, follow the steps provided here in the order presented..

> **IMPORTANT**
> This document assumes that you already have a deployment of Microsoft Dynamics 365 on-premises. For information about how to deploy Microsoft Dynamics 365, see Microsoft Dynamics CRM Server installation.
>
> To migrate from Dynamics CRM Online 2016 Update to Dynamics 365 (on-premises), you must have Dynamics CRM 2015 or a later version.

## Feature and customization changes when you migrate from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises

Before you migrate from Dynamics CRM Online 2016 Update to Microsoft Dynamics 365 on-premises, be aware of the following behaviors or issues. These characteristics will appear after you import a Dynamics CRM Online 2016 Update organization into a Microsoft Dynamics 365 on-premises deployment.

**Managed solutions**

All managed solutions that have a dependency on a feature introduced in Dynamics CRM Online 2016 Update will be removed from the organization that is prepared for migration. For example, this applies if the solution includes one or more of the following features:

- A rollup field that uses the AVG operator or aggregates data across all activities related to a record.
- A calculated field that computes the difference between two dates by using DIFFINDAYS, DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, you can't export record creation or update rules from Dynamics CRM Online 2016 Update to Microsoft Dynamics 365 on-premises. More information: Set up rules to automatically create or update records in Dynamics 365 (Customer Service)

**Unmanaged solutions**

Any field in an unmanaged solution that includes a feature introduced in Dynamics CRM Online 2016 Update will be removed from the organization. For example, this applies if the field includes one of the following features:

- A rollup field that uses the AVG operator or aggregates data across all activities related to a record.
- A calculated field that computes the difference between two dates by using DIFFINDAYS, DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, these behaviors appear:

- You can't export record creation or update rules from Dynamics CRM Online 2016 Update to Microsoft Dynamics 365 on-premises. More information: Set up rules to automatically create or update records in Dynamics 365 (Customer Service)

- Records with date and time fields having values earlier than January 1, 1900 are considered invalid and will return an error message, such as "Invalid Date/Time The date/time format is not valid, or the value is outside the supported range." When this issue occurs you can't open forms, view lists, or process workflows from an entity record that has a date and time value that's before January 1, 1900.

## Copy your Dynamics 365 (online) organization encryption key

During the import of the Dynamics 365 (online) database into your Dynamics 365 (on-premises) deployment, you must provide the organization database encryption key used for your instance of Dynamics 365 (online).

1. Sign in to the instance of Dynamics 365 (online) that you want to migrate as a user with the system administrator security role.

2. Go to **Settings** > **Data Management**.

3. Choose **Data Encryption**.

4. In the Data Encryption dialog box, select **Show Encryption Key**, in the **Current encryption key** box select the encryption key, and copy it to the clipboard.

5. Paste the encryption key in to a text editor, such as Notepad.

   > **WARNING**
   >
   > By default, Dynamics 365 generates a passphrase that is a random collection of Unicode characters. Therefore, you must save the system-generated passphrase by using an application and file that supports Unicode characters. Some text editors, such as Notepad use ANSI coding by default. Before you save the passphrase using Notepad, select **Save As**, and then in the **Encoding** list, select **Unicode**.

6. As a best practice, save the file that contains the encryption key on a computer in a secure location on an encrypted hard drive.

## Request a backup of your organization database

To request a backup of your Dynamics 365 (online) database contact Microsoft Customer Support Services for Dynamics 365 (online). For contact information, see Contact Technical Support.

> **IMPORTANT**
>
> Obtaining a backup of your Dynamics 365 (online) database isn't available with Dynamics 365 (online), version 9.x.

## Restore the Microsoft Dynamics 365 (online) database

The backup of your Dynamics 365 (online) database must be restored by using a server running the same or a later version of SQL Server as the database you receive. You will be able to request the version you need before you receive the database.

Restore the copy of the Dynamics 365 (online) database to a computer running SQL Server in the target Dynamics 365 (on-premises) deployment. To do this, follow the steps here.

> **IMPORTANT**
>
> Your Dynamics 365 (online) database may be encrypted with a certificate. For more information, see "Cannot find server certificate with thumbprint" error message when you try to restore a Dynamics 365 organization database later in this topic.

**Restore a Microsoft Dynamics 365 (online) organization database to SQL Server**

1. Open SQL Server Management Studio, and then connect to the appropriate instance of SQL Server.
2. In Object Explorer, right-click **Databases**, and then click **Restore Database**.
3. Type the name of a new database in the **To database** open text box. The database name must include _MSCRM in the name. For example the database name is Contoso_MSCRM.
4. On the **General** page, in the **Source** section, click **Device**.
5. Click the browse button in the **Device** option. This opens the **Select backup devices** window.
6. In the **Select backup devices** window, click **Add** to open the **Locate Backup File** window.
7. Select the file you want to use for the restore operation, and then click **OK**.
8. Click **OK** to close the **Select backup device** window.
9. Mark the checkbox in the **Restore column next to the backup set** option.
10. Click **OK** to begin the restore process.

## Apply the latest updates to the Dynamics 365 on-premises deployment

You must apply the latest Dynamics 365 (on-premises) updates before you import the Dynamics 365 (online) database. More information: Microsoft Dynamics CRM 2016 Updates and Hotfixes

## Import the Dynamics 365 (online) database into the Dynamics 365 on-premises deployment

How long it takes to complete the import of the organization database depends on several factors. These factors include the size of the database you are importing, the number of users, and the hardware you use to complete the import.

> **NOTE**
>
> The procedure described here uses Dynamics 365 Deployment Manager. Deployment Manager is an MMC snap-in that is included with Dynamics 365 Server. Alternatively, your can run Windows PowerShell commands to complete the import. More information: Import-CrmOrganization
>
> To import an organization, you must have the Deployment Administrator Microsoft Dynamics 365 role.

**Import an organization database using Deployment Manager**

1. On the Microsoft Windows Server running the Microsoft Dynamics 365 Server Deployment Tools server role, start **Deployment Manager** (DMSnapin.msc).
2. Start the Import Organization Wizard. Right-click **Organizations**, and then click **Import Organization**.

> **NOTE**
>
> You will receive a message if you attempt to import into a Dynamics 365 (on-premises) version that allows only one organization per deployment. The message notifies you that proceeding will deactivate, but not delete, the existing organization.

3. Select the SQL Server and database. In the **Select SQL Server** window, select the SQL Server where the organization database is restored in the **SQL Server** list, and then select the organization database in the **Organization database** list. Click **Next**.

4. Specify the organization name. Enter the display name and name for the organization in the **Specify the Organization Settings** window. The **Display name** will appear in Dynamics 365 applications. The **Unique Database name** will be used as the database name in SQL Server and will also be used to construct the URL for client applications. Notice that the values you enter don't need to match the names that you used with Dynamics 365 (online). Click **Next**.

5. Specify the SQL Server Reporting Services server. In the **Specify Reporting Services Server** window, type the Reporting Services server URL for the organization in the **Report Server URL** field. Click **Next**.

6. Select the method for mapping users. Map users from the Dynamics 365 (online) deployment to the Dynamics 365 (on-premises) deployment. Users must already exist in Active Directory for the Dynamics 365 (on-premises) deployment. The Import Organization Wizard does not create the users automatically. To complete the mappings, the user running the import operation must be mapped to a user in Dynamics 365. For more information about how to map users, see Import an organization.

7. In the System Checks window you receive the results of several environment diagnostic checks. If you receive a red alert, the issue must be resolved prior to completing the wizard. If you receive a yellow warning, you may proceed with the import. Click **Next**.

   Due to versioning differences between Dynamics 365 (online) and Dynamics 365 (on-premises), you may receive a warning. This warning is expected and in most cases shouldn't prevent the import from completing. After you successfully complete the steps in this document, the versioning will be correct.

8. Begin the import. In the Ready to Import window, verify that the information is correct, and then click **Import**.

9. Complete the import. After the import is complete, the Import Organization window appears. Click **View** the log file to view the log file that is created during the import. If the import is successful, click **Finish**.

   The import log is stored in the C:\Documents and Settings\\Application Data\Microsoft\MSCRM\Logs folder.

10. Activate encryption

    a. As a user with System Administrator security role privileges, sign-in to the organization that was just imported, then go to Settings > Data Management.

    b. Choose **Data Encryption**.

    c. In the **Activate Encryption Key** box enter the encryption key that you copied earlier, and then select **Activate**.

    d. Select **OK** in the confirmation message and then choose **Close** to exit the Data Encryption page.

    e. We recommend that you copy the key to a safe place.

# "Cannot find server certificate with thumbprint" error message when

## you try to restore a Dynamics 365 organization database

When you try to restore a Dynamics 365 organization database, you may receive the following error message.

An exception occurred while executing a Transact-SQL statement or batch. (Microsoft.SqlServer.ConnectionInfo)

Additional Information: Cannot find server certificate with thumbprint.

This error message occurs because the database that is to be restored is using Transparent Data Encryption (TDE). A certificate must be present to restore the database.

To resolve this issue, follow these steps.

1. Obtain the certificate. Dynamics 365 (online) customers receive the certificate as part of the power of choice backup of your database. Additional instructions may also be included.

2. Execute the following SQL statements in the order specified to import the certificate where:

   - CustomerGeneratedStrongPassword is the password you want to use to create the master key.

   - DomainName, GUID, .cer, .pvk, and Certificate secured password provided are values that are included in the information sent to you from Microsoft for importing the TDE certificate.

```
use master
GO

/* Check if DMK (##MS_DatabaseMasterKey##) exists. */
select * from sys.symmetric_keys
GO

/* If key does not exist, create database master key */
CREATE MASTER KEY ENCRYPTION BY PASSWORD = '<CustomerGenerated-StrongPassword>'
GO

/* Verify that the database master key is created */
select * from sys.symmetric_keys
GO

/* Import the certificate provided for TDE Database backup. TDE certificate name will also be provided
in email */
CREATE CERTIFICATE LTOP_<DomainName>_<GUID> FROM FILE = 'D:\<>_1.cer' WITH PRIVATE KEY (FILE = 'D:\
<>_1.pvk', DECRYPTION BY PASSWORD = '<Certificate secured password provided>')
```

3. Restore the organization database. To do this, see Restore the Microsoft Dynamics 365 (online) database.

> **IMPORTANT**
>
> We strongly recommend that you store your TDE certificate in a secure location. If the certificate is lost and the database is encrypted, you will lose your data. For more information about TDE encryption, see Move a TDE Protected Database to Another SQL Server.

# Manage the encryption keys

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 8.x

All instances of Dynamics 365 (online) use SQL Server Transparent Data Encryption (TDE) to perform real-time encryption of data when written to disk, also known as encryption at rest.

By default, Microsoft stores and manages the database encryption keys for your instances of Dynamics 365 (online) so you don't have to. The manage keys feature in the Dynamics 365 admin center gives administrators the ability to self-manage the database encryption keys that are associated with instances of Dynamics 365 (online).

**IMPORTANT**

Self-managed database encryption keys are only available in the December 2016 Update for Dynamics 365 (online) and may not be made available for later versions.

## Introduction to key management

With Dynamics 365 (online) key management, administrators can provide their own encryption key or have an encryption key generated for them, which is used to protect the database for an instance.

The key management feature supports both PFX and BYOK encryption key files, such as those stored in a hardware security module (HSM). To use the upload encryption key option you need both the public and private encryption key.

The key management feature takes the complexity out of encryption key management by using Azure Key Vault to securely store encryption keys. Azure Key Vault helps safeguard cryptographic keys and secrets used by cloud applications and services. The key management feature doesn't require that you have an Azure Key Vault subscription and for most situations there is no need to access encryption keys used for Dynamics 365 (online) within the vault.

The manage keys feature lets you perform the following tasks.

- Enable the ability to self-manage database encryption keys that are associated with Dynamics 365 (online) instances.
- Generate new encryption keys or upload existing .PFX or .BYOK encryption key files.
- Lock a Dynamics 365 (online) instance.

  **Caution**

  You should never lock an instance as part of your normal business process. While a Dynamics 365 (online) instance is locked it takes the instance completely offline and it cannot be accessed by anyone, including Microsoft. Additionally, services such as synchronization and maintenance are all stopped. An appropriate reason why you would lock an instance is when you move your database from online to on-premises. Locking the instance can make sure that your online data is never accessed again by anyone.

  A locked instance can't be restored from backup.

- Unlock a Dynamics 365 (online) instance. To unlock a locked instance of Dynamics 365 (online), you must upload the encryption key that was used to lock it. While a Dynamics 365 (online) instance is locked, it cannot be accessed by anyone.

## Understand the potential risk when you manage your keys

As with any business critical application, personnel within your organization who have administrative-level access must be trusted. Before you use the key management feature, you should understand the risk when you manage your database encryption keys. It is conceivable that a malicious administrator (a person who is granted or has gained administrator-level access with intent to harm an organization's security or business processes) working within your organization might use the manage keys feature to create a key and use it to lock a Dynamics 365 (online) instance. Consider the following sequence of events.

1. The malicious administrator signs in to the Dynamics 365 admin center, goes to the edit page for an instance, and then generates a new encryption key to use to encrypt the instance. As part of the key generation, the malicious Dynamics 365 administrator downloads the encryption key.

2. The malicious administrator locks the associated Dynamics 365 (online) instance and takes or deletes the encryption key that was used to lock the instance.

> **IMPORTANT**
>
> To prevent the malicious administrator from interrupting the business operations by locking the database, the managed keys feature does not allow the database to be locked for 72 hours after the encryption key is changed. Additionally, anytime an encryption key is changed for a Dynamics 365 (online) instance, all Dynamics 365 (online) administrators receive an email message alerting them of the key change. This provides up to 72 hours for other administrators to roll back any unauthorized key changes.

## Key management requirements

**Privileges required**

To use the manage keys feature you need one of the following privileges:

- Office 365 Global Administrators membership.

- Office 365 Service Administrators group membership.

- System Administrator security role for the instance of Dynamics 365 (online) that you want to manage the encryption key.

**Subscription requirements**

The ability to self-manage database encryption keys requires either Dynamics 365 Customer Engagement Plan or Dynamics 365 Plan.

**Encryption key requirements**

If you provide your own encryption key, your key must meet these requirements that are accepted by Azure Key Vault.

- The encryption key file format must be PFX or BYOK.

- 2048-bit RSA or RSA-HSM key type.

- PFX encryption key files must be password protected.

For more information about the key types supported by Key Vault by uploading the file in the Dynamics 365 admin center. Only the encrypted version of your key leaves the original workstation. For more information about generating and transferring an HSM-protected key over the Internet see How to generate and transfer HSM-protected keys for Azure Key Vault.

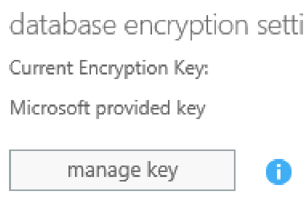
## Key management tasks

The following sections describe the tasks you can perform when you choose to self-manage the database encryption key for one or more instances.

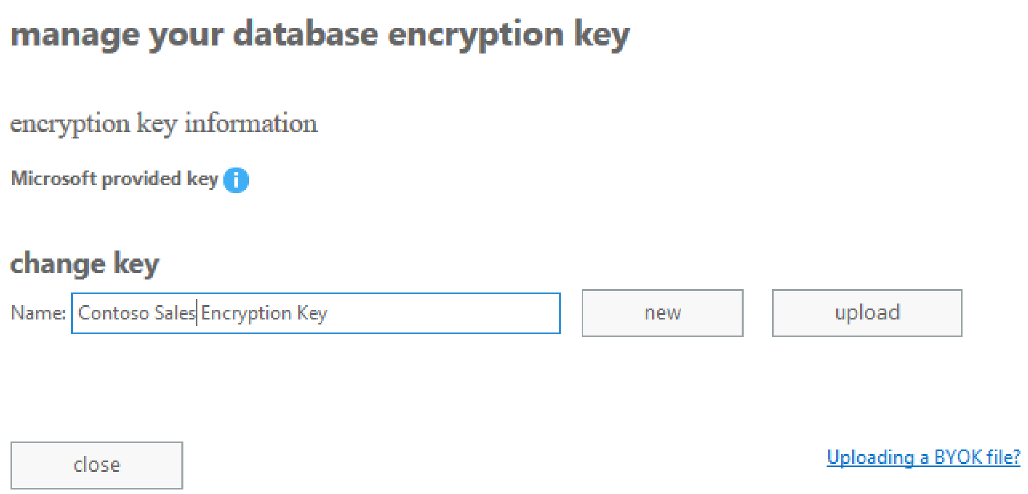
### Set or change the encryption key for an instance

Use this procedure to set the manage key feature the first time for an instance or to change an encryption key for an already self-managed instance.

1. Sign in to the Office 365 Admin center.
2. Expand **Admin centers**, and then click **Dynamics 365**.
3. Click **Instance**, select the instance where you want to manage the database encryption key, and then click **Edit**.
4. Under **database encryption settings**, click **manage key**.




5. Review the message that appears and if you want to manage your own database encryption key for the instance, click **ok**.
6. By default, the name for the key is *InstanceName Encryption Key*. Leave the key name or change it and then click either **new** or **upload**.




**new**
Click **new** to have a .PFX encryption key generated for you that will be used to encrypt the database.

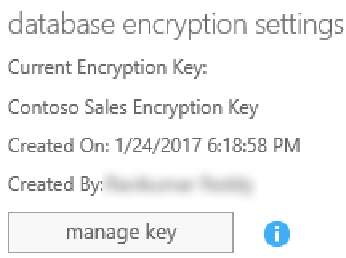
```
1.  When you are prompted, enter the password that will be used for the encryption key.

2.  To use the key for the instance, click **Yes**.

3.  When you're prompted to save the private key, save it to a secure location. The key generated is RSA SHA256 2048-bit. We strongly recommend that you back up the key and save the password to a secure location.

4.  Click **close** to close the manage your database encryption key dialog box.
```

**upload**

Click **upload** to provide your own password protected PFX or BYOK encryption key file.

```
1.  Browse for and add your own key that has been exported from your local hardware security module (HSM) or
encryption key application. For BYOK encryption key files, make sure you use the subscription id when you
export the encryption key from your local HSM. Click **Uploading a BYOK file?** on the **manage you database
encryption key** dialog box to find your subscription id.

2.  If you’re sure you want to change the encryption key, click **yes**.

3.  Enter a password for the key, and click **ok**.

4.  Click **close** to close the manage your database encryption key dialog box.

5.  An email message is sent to all [!INCLUDE[pn_crm_online_shortest](../includes/pn-crm-online-shortest.md)]
administrators in your organization. This occurs whenever a key is changed for an instance.
```

Notice that the key name you specified to manage database encryption settings now appears under **Current Encryption Key**.




#### Revert a managed encryption key

Reverting a managed key configures the instance back to the default behavior where Microsoft manages the encryption key for you.

- From the Dynamics 365 admin center, click **Instance**, select the instance that you want to revert, and then click **Edit**.
- Under **database encryption settings**, click **manage key**.
- Click **revert**.
- To revert the instance back to Microsoft-managed key encryption, click **yes**.
- Click **close** to close the manage your database encryption key dialog box.

#### Lock an instance

A locked instance remains inaccessible to everyone, including Microsoft, until a tenant administrator in your organization unlocks it by using the key that was used to lock it.

Caution

While a Dynamics 365 (online) instance is locked it takes the instance completely offline and it cannot be accessed by anyone, including Microsoft. Additionally, services such as synchronization and maintenance are all stopped. You should never lock an instance as part of your normal business process. A common reason why you would lock an instance is when you move your database from online to on-premises. Locking the instance can make sure that your online data is never access again by anyone.

A locked instance can’t be restored from backup.

1. From the Dynamics 365 admin center, click **Instance**, select the instance that you want to lock, and then click **Edit**.

2. Under **database encryption settings**, click **manage key**.

3. Click **lock instance**.

4. Enter the name as it appears in the dialog box to confirm that you understand the risks with locking an instance, and then click **upload**.

5. Browse for and select the encryption key file that was used to encrypt the instance, and then click **Open**.

6. Enter the password for the key, and then click **ok**.

7. To lock the instance, click **yes**.

8. Click **close** to close the manage your database encryption key dialog box.

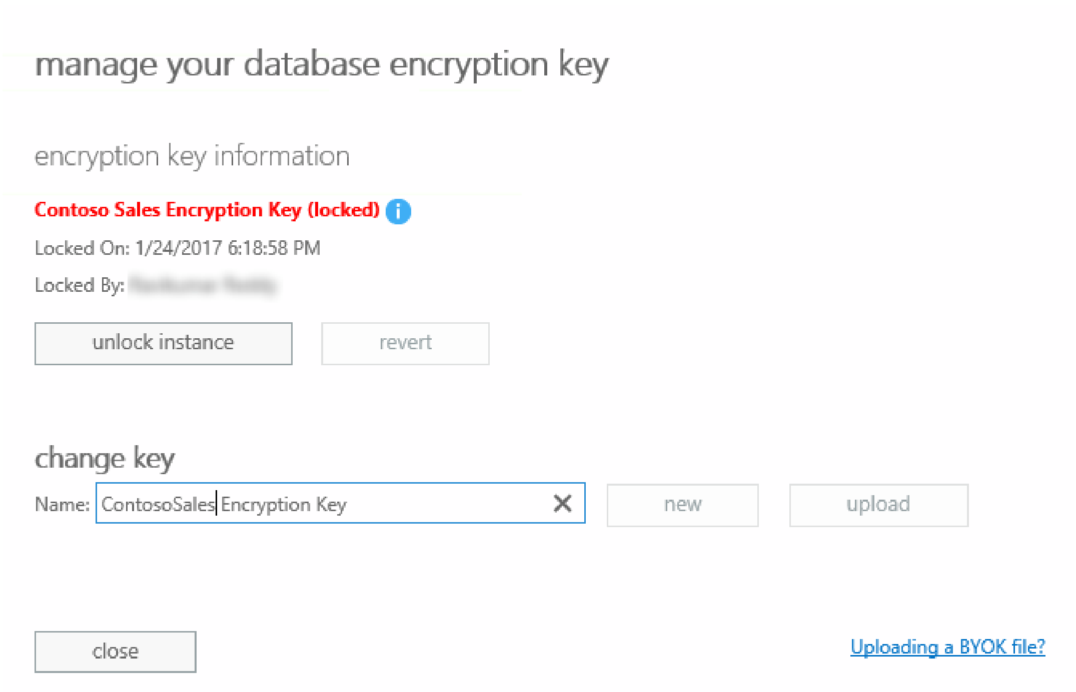
### Unlock a locked instance

To unlock an instance, you must provide the encryption key and password that was used to lock the instance.

1. From the Dynamics 365 admin center, click **Instance**, select the instance that you want to unlock, and then click **Edit**.

2. Under **database encryption settings**, click **manage key**.

3. Click **unlock instance**.




4. Browse for and select the encryption key that was used to encrypt the instance, and then click **Open**.

5. Enter the password for the key, and then click **ok**.

6. Click **close** to close the manage your database encryption key dialog box.

### See also

[SQL Server: Transparent Data Encryption (TDE)]

# Troubleshooting: Unblock required URLs

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 (online) uses several Microsoft URLs to help provide security, services, and features. However, your computer or your organization's computer network may block access to some of these URLs. Blocking any of the required URLs will cause Dynamics 365 (online) to operate incorrectly or not at all.

You may see a network or server error message if your computer or your organization's network blocks the URLs you need. The error message might look like one of these:

- "The specified Dynamics 365 Server address (URL) is not responding. Ask your administrator to verify that the server is turned on, and then try again."
- "There is a problem communicating with the Dynamics 365 Server. The server might be unavailable."

You can unblock these URLs on your computer by adding them to a list of approved sites in your browser.

> **IMPORTANT**
> If the following procedure doesn't unblock the URLs required for Dynamics 365, ask your system administrator to unblock the URLs on the organization's network.

**Unblock Dynamics 365 URLs in Internet Explorer**

1. On the Explorer bar, click or tap the **Tools** icon (the white gear shape), and then click or tap **Internet options**.
2. Click or tap the **Security** tab > **Trusted sites** > **Sites**.
3. In **Add this website to the zone**, type the URL for your Dynamics 365 (online) organization. For example, https://contoso.crm.dynamics.com
4. Click or tap **Add** > **Close** > **OK**.

For a list of other URLs you may need to add to unblock, see Internet accessible URLs required for Microsoft Dynamics CRM Online

# Datacenter regions

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 (online) is being hosted in datacenters in more and more regions. After Dynamics 365 (online) becomes available in a new region, the following apply:

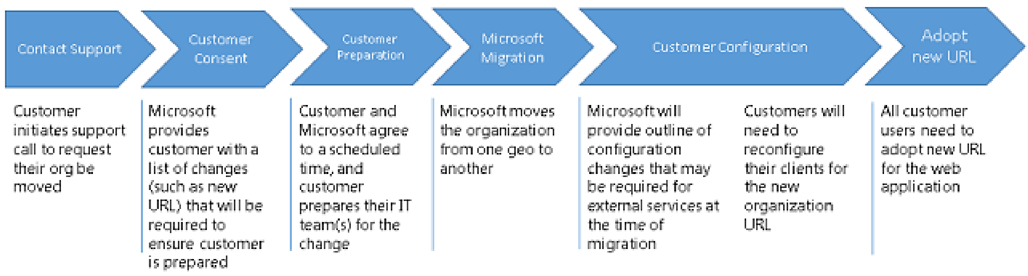
- For new Dynamics 365 (online) organizations, the datacenter will be aligned with the country/region you selected during sign-up.
- For existing Dynamics 365 (online) organizations, Microsoft will soon accommodate migrations to datacenters in the new region when requested by the customer as long as the Dynamics 365 (online) organization meets certain business requirements.

The following table lists the newest datacenter regions. Checkout the interactive data map: Where is my data?

| DATACENTER REGIONS | SERVICE AREA | INFORMATION |
|---|---|---|
| **Canada** | Canada | About Microsoft Cloud Canada |
| **Germany** | Germany | About Microsoft Cloud Germany |
| **India** | India | About Microsoft Cloud India |
| **Japan** | Japan | About Microsoft Cloud Japan |
| **Oceania** | Australia, New Zealand, Fiji | About Microsoft Cloud Australia |

## Migration process

This is the overall process for migrating to a new datacenter.




Depending on the type of transition, you may be required to go through more steps.

### See also

Geo to geo migrations for Dynamics 365 (online)
Products by region
Terminology used in the product and documentation

# About the Microsoft Cloud Australia datacenter

8/24/2018 • 14 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You may request migration to the Australia datacenter upon datacenter availability (Q1 CY2015).

If you're an existing Dynamics 365 (online) customer with a billing address mapping to a new data center region, review the information in this topic to understand the move process.

## Australia GEO expansion announcement

**What is Microsoft announcing?**

Dynamics 365 (online) will become a service within the Australia datacenters with availability in Q1 CY2015.

Dynamics 365 (online) is currently available in 130 markets and 44 languages enabling us to sell side-by-side with Office 365 in the majority of the markets worldwide. With the inclusion of datacenters in Japan (recently announced) and Australia, both targeting Q1 CY2015, our global customers will be served by 17 datacenters covering 6 global regions around the world.

This marks an important step for customers and partners on our cloud journey to serve our customers in Australia, New Zealand, and Oceania (Australia GEO). By bringing Dynamics 365 (online) to the local region, we'll be able to serve our customers more effectively and with better performance while also ensuring compliance with local requirements.

**What prompted Microsoft to undertake this geographic expansion of Dynamics 365 (online)?**

In order to better serve customer needs for data residency and reduced latency, we continually evaluate where we should expand availability around the world. We are committed to long-term investment in Dynamics 365 (online) and expansion over time.

This global expansion will enable us to deliver on the promise of increasing sales productivity while allowing our customers to sell effectively, market smarter, and provide care everywhere to offer amazing experiences to their customers.

**What are the future geographic expansion plans for Dynamics 365 (online)?**

Geographic expansion of Dynamics 365 (online) is a high priority and we're constantly evaluating market needs. While we have no additional information or specifics on future plans to announce at this time, we will update if and when we have something to share.

## Datacenter overview

**Where are the datacenters located in the Australia Geo?**

The Dynamics 365 (online) Australia Geo will consist of datacenters in the Australia East Region (New South Wales) and the Australia Southeast Region (Victoria).

**What does this announcement mean for customers in the Australia Geo?**

Microsoft is committed to meeting the growing demand for reliable and connected devices and services for our customers around the globe. We have heard loud and clear that our customers in the Australia Geo need locally delivered services. The growth of Dynamics 365 (online) in the Australia Geo means we can better serve the needs of these customers in three ways:

- Most customer data will be kept within Australia, except for Azure Active Directory data*, helping customers meet data residency requirements.
- Customers who deploy applications to the new Australia datacenters enjoy improved performance within the Australia Geo as network latency is reduced.
- Our expansion in the Australia Geo also provides customers with the same level of high availability and redundancy as with our datacenters in other countries/regions. Customers in Australia, New Zealand, and Oceania will enjoy the benefit of a financially backed 99.9% service level agreement (SLA) and redundancy both inside of the primary datacenter where they are deployed as well as to the secondary datacenter in the Australia geography to help ensure ongoing uptime and protect against a major disaster in a single region.

*The Australia Geo will be considered a separate Geo subject to the same data location commitments we make for other Geos. For the definition of customer data and details on our data flow maps in Geo, see the Dynamics Trust Center.

**What region will be used for replication of data for the Australia Geo?**

Dynamics 365 (online) services deployed in the Australia East Region will replicate data to the Australia Southeast Region and vice-versa.

For the Australia East and Southeast Region datacenters, access to provisioning resources in these datacenters is limited, as described here:

- For Web Direct, access to the datacenters is based on the country/region set in your Dynamics 365 (online) account.
  - If the account country/region is Australia, New Zealand or Fiji, Dynamics 365 (online) resources will be provisioned in the Australia East and Southeast Region datacenters.
  - If the account country/region is not Australia, New Zealand, or Fiji, the customer will not be able to provision Dynamics 365 (online) services in the Australia East and Southeast Region datacenters. To do so a customer needs to try or purchase Dynamics 365 (online) for an organization located in Australia, New Zealand or Fiji. The customer can create another Web direct account for organizations located in Australia, New Zealand and Fiji, with a billing address in any these regions, if they wish to select and deploy Dynamics 365 (online) services in the Australia East and Southeast Region datacenters.
- For Volume Licensing (VL) customers, access to the datacenters is based on the country/region in which the volume license agreement was signed.
  - If the VL agreement was signed in Australia, New Zealand, or Fiji, the customer will be able to use Dynamics 365 (online) services in the Australia East and Southeast region datacenters. Accounts added to the VL agreement will be enabled to use Dynamics 365 (online) in the Australia East and Southeast Region datacenters.
  - VL customers can also create a secondary deployment in Australia, New Zealand, or Fiji under an existing VL agreement by either signing an enrollment in Australia, New Zealand, or Fiji or by applying for a multitenant amendment through the local Licensing Specialist.
- Web direct and VL customers in Australia will still have the ability to deploy instances in datacenters outside of Australia – however, you must have a tenant already provisioned in Australia. Under this multitenant/multi-geo scenario, AU GST will still be applied to instances deployed in other regions.

**How do I find what country or region my account is under?**

1. Sign in to https://portal.office.com.
2. In the upper-right corner of Office 365 Admin Center, choose your organization.


3. On the **Company profile** page, your account country/region is listed under **Country or region**.

# Dynamics 365 (online) service overview

**Will multi-geo instances be available to customers in Australia?**

- Multi-geo instances will be supported for Australian customers as long as the tenant is first provisioned in Australia. For customers who aren't located in Australia but want to provision an instance of Dynamics 365 (online) within the Australia datacenter, they must first purchase a tenant for an organization located in Australia and then the tenant will be able to get provisioned in Australia.
- Availability of multi-geo instance support will be limited in the initial rollout to a fixed number of eligible customers upon request, and we will continue to expand over time.

**Will the standard Dynamics 365 Online SLA be offered at general availability launch?**

Yes, on the date of general availability, the standard 99.9 % financially backed service level agreement (SLA) for Dynamics 365 (online) will apply, just as it does in our other regions around the world. Note: the SLA for Dynamics 365 (online) doesn't cover Microsoft Social Engagement.

**What rules govern New Zealand or Oceania customers who want to license affiliates located in Australia?**

A New Zealand and Oceania customer may not place orders under its existing agreement for any affiliate located in Australia, nor grant any affiliate located in Australia administrative rights to manage subscriptions, if the customer elects to access and use services delivered from datacenters located in Australia. An affiliate located in Australia that wants to access and use Online Services delivered from our datacenters located in Australia must enter into its own subscription under its separate Microsoft Online Services Agreement.

**Will Microsoft Dynamics Marketing, Social Engagement, and Parature be available in the Australia datacenters?**

These services will be available for purchase in the local market but will be delivered outside of the Australia Datacenters at this time. Note: Dynamics 365 (online) leverages Azure Active Directory and Multi-Factor Authentication, which don't offer a region choice to customers.

**Will Dynamics 365 be available on Azure Infrastructure as a Service (IaaS) in Australia?**

At this time, Dynamics 365 (online) is only available for Dev/Test scenarios and isn't supported for production use cases. Developers can leverage their MSDN subscription and Azure credits for dev/test scenarios. Note: we recently announced intent to support Dynamics 365 (online) on Azure IaaS but we're dependent on Azure Premium Storage availability in each geography. Azure's Limited Public Preview will only be available in the U.S. and part of Europe.

**Where can I find more about Dynamics 365 (online) security, data privacy, and compliance?**

The Microsoft Dynamics 365 Trust Center will be updated as needed when the Australia Datacenters launch into general availability.

**What data for Dynamics 365 (online) will be in Australia datacenters at general availability?**

For Dynamics 365 (online), we'll store all customer data, including backups, within the Australia Datacenter. For any Office 365 services that are running in conjunction with Dynamics 365 (online) those services will follow the data storage rules for Office 365.

**Will Dynamics 365 (online) be Information Security Registered Assessors Program (IRAP) certified when the datacenters are live in Australia?**

We're actively investigating IRAP requirements and how they relate specifically to Dynamics 365 (online) and we'll share more information at a later date.

**Where can I find out more about the physical infrastructure for Dynamics 365 (online)?**

Microsoft Cloud Infrastructure and Operations (MCIO) powers the Microsoft cloud services. MCIO focuses on smart growth, high reliability, operational excellence, cost-effectiveness, environmental sustainability, and a trustworthy online experience for customers and partners worldwide.

MCIO delivers the core infrastructure and foundational technologies for Microsoft's 200+ online businesses including Bing, Outlook.com, MSN, Office 365, Xbox Live, and Dynamics 365 (online). The infrastructure is comprised of a large global portfolio of datacenters, servers, content distribution networks, edge computing nodes, and fiber optic networks.

# Migration

**I have applications and data in an existing Microsoft Dynamics 365 (online) datacenter. Will I be able to move those resources to the Australia datacenters?**

For Web direct customers, if the account country/region is Australia, New Zealand, or Fiji, the customer will be eligible to have his instances moved to the Australia East and Southeast region datacenters.

- The account country/region can be found in the Office 365 Admin Center.

  1. Sign in to https://portal.office.com.

  2. In the upper-right corner of Office 365 Admin Center, choose your organization.

  3. On the **Company profile** page, your account country/region is listed under **Country or region**.

- If the account country/region is outside Australia, New Zealand, or Fiji, you'll need to create another Web direct account with a billing address in Australia, New Zealand, or Oceania. Once the new account and tenant are created, you can then request the move of their Dynamics 365 (online) instance and data from other regions into the Australia region by contacting Dynamics 365 (online) Support. For more information, see How do I request my instance to be moved to the Australia datacenter? Microsoft reserves the right to make a unilateral decision to migrate accounts based on multiple conditions.

  If you're a volume license customer and the volume license agreement was signed in Australia, New Zealand, or Oceania, you'll be eligible to move applications and data to the Australia East and Southeast region datacenters and deploy services there.

- Accounts added to the volume license agreement are eligible to move applications and data to the Australia East and Southeast region datacenters and deploy services there.

- To provision a tenant in the Australia datacenter, if you have a volume license enrollment outside the Australia datacenter you will need to sign an enrollment in Australia, New Zealand, or Oceania and then migrate existing instances to the Australia datacenter.

- To move your tenants, instances, and data to the Australia regions, you should contact Dynamics 365 (online) Support for additional information regarding migrating your instances. For more information, see How do I request my instance to be moved to the Australia datacenter? Microsoft reserves the right to make a unilateral decision to migrate accounts based on multiple conditions.

  For additional guidance regarding multiple tenants and multiple instances, see Multiple online instances or tenants. This link will be updated with the Dynamics 365 (online) 2015 launch.

**How do I request my instance to be moved to the Australia datacenter?**

You can request a move to the new Australian datacenter by submitting a technical support incident through the Office 365 Admin Center.

1. Sign in to https://portal.office.com.
2. Go to **Support** > **Service Requests** > +
3. Choose **More** > **Dynamics 365 Online**
4. For **Feature**, select **Data Management**. For **Symptom**, select **Data Center migration request**.
5. Fill in the rest of the information to submit a service request.

   A Dynamics 365 (online) support engineer will assist you in verifying required prerequisites and provide guidance throughout the move process.

**How will Microsoft engage with me on the migration?**

Once you have been scheduled for migration, a member of the Microsoft Support team will work directly with you to discuss scheduling and any other issues that may come up during the migration.

**If I am scheduled for an update to CRM Online 2015 Update or CRM Online 2015 Update 1, will Microsoft apply the update at the same time as their migration to the Australia datacenter?**

You must be updated to Microsoft Dynamics CRM Online 2015 Update or later prior to migrating to the Australia datacenter. Customers can schedule their update. For more information, see Manage Dynamics 365 (online) updates.

**If I have both Office 365 services and Dynamics 365 (online), how will migration be handled?**

The migration of each service will be handled separately. For Dynamics 365 (online), you'll be able to choose their migration date and time. Microsoft will work with you to schedule the migration. For Office 365 scheduling and migration, see New datacenter regions for Office 365.

**Can I move Office 365 and Dynamics 365 (online) at the same time?**

The move process for each service is handled separately but the Dynamics 365 (online) move can be scheduled to coincide with the Office 365 Admin Center move if requested.

# Pricing and licensing

**Will all versions of Dynamics 365 Online be available?**

Customers will be able to purchase all licenses that are currently available in market today. Please see local availability at Microsoft Dynamics CRM Solutions. Global pricing can be found at Microsoft Dynamics Pricing List

**How will a customer who has an existing volume license (VL) agreement outside of Australia be billed if they add a new tenant to their agreement that resides in Australia?**

The additional seats will be invoiced at the same rate on the customer's invoice. The business desk will need to provide a multi-tenant amendment to provide an additional tenant in Australia.

**Will customers who purchase Dynamics CRM Online and an additional service such as Parature, Dynamics Marketing, or Microsoft Social Engagement be taxed differently per service?**

Microsoft has a datacenter footprint that varies according to each online service offered. Dynamics 365 (online) will be provisioned and available from datacenters located within Australia, which makes those services subject to some taxes that do not necessarily apply to tenants located and provisioned outside Australia. Microsoft Social Engagement has their own datacenter footprint; they're offered from to customers in Australia from datacenters outside of Australia. Therefore, these online services are subject to a different tax treatment.

# Tax and billing

**Will there be any changes on my bill?**

New Zealand and Fiji customers will see no changes on their invoices.

For Australia customers, from the general availability date when Dynamics 365 (online) services become available from Microsoft Australia datacenters, Microsoft will charge all Australian customers an additional amount equal to the Australian GST for Dynamics 365 (online) services and will issue tax invoices. This change will occur because Australian GST is payable on taxable supplies of goods and services provided and offered in Australia.

**My tenant has not moved to Australia datacenter, why am I being charged Australia Goods and Service Tax (GST)?**

There are various factors that must be considered to determine whether GST is payable on the supply. Australian GST is payable on taxable supplies of goods and services provided and offered in Australia.

## Trials

**If I started a trial outside of Australia and before general availability, will I be moved to the Australia datacenter after general availability?**

No. Trials will remain in the geography where they were initiated. You may choose to start a new trial that would be provisioned in the Australia datacenter.

**If I choose to convert a trial to a paid subscription, where the trial was created in a geographic region outside of Australia prior to general availability, will my subscription tenant and instance be moved to the Australia datacenter?**

No. If you choose to convert a trial that was created in a geographic region outside of Australia before general availability, your trial will be converted and billed in the geography where it was initiated. Australia GST does not apply.

If the trial was originally deployed in Australia and converted to a paid subscription, you'll charged Australia GST.

If you decide you want your instance to be in the Australia datacenter, you'll need to follow the migration steps outlined previously. Once you're moved to Australia, the appropriate billing and tax will be applied.

**If a customer creates a trial in the Australia datacenter after general availability, will they be taxed for the trial?**

No. Trials are free for 30 days.

**Can I create a trial in the Australia datacenter before general availability?**

No. You can't create a trial or move a production instance before general availability.

**See also**

Office 365 and Dynamics CRM Online now available from datacenters in Australia
New datacenter regions for Dynamics 365 (online)

# About the Microsoft Cloud Canada datacenter

8/24/2018 • 6 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

## New Microsoft Cloud Services in Canada

**What is Microsoft announcing?**

We're announcing the general availability of Dynamics 365 (online) served from new datacenter regions in Toronto and Quebec City, joining Azure and Office 365 in providing the trusted Microsoft Cloud in Canada.

Built on foundational principles of security, privacy and control, compliance, and transparency, the Microsoft Cloud delivers trusted cloud services to enable people and organizations to achieve more. Providing flexible platform and productivity solutions - Azure, Office 365, and now Dynamics 365 (online) - the local Microsoft Cloud is designed to fuel innovation and accelerate Canada's digital transformation.

**What is the benefit to customers?**

The new local Microsoft Cloud enables data residency for customers in Canada, bringing enterprise-grade reliability and performance to regulated industries and other businesses. This includes data replication in multiple regions within Canada for business continuity, reduced network distance, and the option of a private connection to the cloud with Azure ExpressRoute. The Microsoft Cloud in Canada comes with the same deep commitment to high availability as our other regions, including a financially backed service level agreement of 99.9%.

For Dynamics 365 (online), data residency means that most customer data will be kept within Canada, except for Azure Active Directory data. For the definition of customer data and details on our data flow maps in Geo, see the Microsoft Dynamics 365 Trust Center.

**Where are the Microsoft Cloud Canada regions?**

The Dynamics 365 (online) Canada Geo will consist of datacenters in Toronto and Quebec City.

**How do I find what country or region my account is under?**

1. Sign in to https://portal.office.com.
2. In the upper-right corner of the Office 365 admin center menu bar, click your organization.


3. On the **Company profile** page, your account country/region is listed under **Country or region**.

## Dynamics 365 (online) service overview

**Will multi-geo instances be available to customers in Canada?**

Yes, multi-geo instances will be supported for Canada. Multi-geo instances are designed for companies with offices in multiple countries or regions who want to keep core customer data within those countries or regions. Availability of multi-geo instance support will be limited in the initial rollout to a fixed number of eligible customers. We'll continue to expand this capacity over time. Read more on how to create and edit multi-geo instances.

#### Will the standard Dynamics 365 Online service level agreements be offered?

Yes, the standard Dynamics 365 (online) service level agreements (SLAs) will apply to the Canada regions, just as they do in our other regions around the world.

> **NOTE**
>
> The SLA for Dynamics 365 (online) doesn't cover Microsoft Social Engagement.

#### Will Microsoft Dynamics Marketing, Social Engagement, and Parature be available in the Canada datacenters?

These services are available for purchase in Canada, however, these services are provisioned regionally at this time.

#### What is the customer experience if I use both Dynamics CRM Online from the Canada regions while using Microsoft Dynamics Marketing, Microsoft Social Engagement, and Parature from other regions?

The customer experience will be unchanged, the workloads for the other services will simply be provisioned from other regions.

#### When will ExpressRoute be available in Canada for Dynamics 365 Online customers, and through which partners?

ExpressRoute is currently available in Canada. View a current list of ExpressRoute locations and partners. Microsoft is currently working to enable customers to use ExpressRoute with Dynamics 365 (online) from the Canada regions.

#### Where can I find more about Microsoft Dynamics 365 (online) security, data privacy, and compliance?

You can find more information at the Microsoft Dynamics 365 Trust Center.

#### Where can I find out more about the physical infrastructure for Dynamics 365 (online)?

These services are hosted in the Microsoft cloud infrastructure comprising more than 100 globally distributed datacenters, edge computing nodes, and service operations centers. This infrastructure is supported by one of the world's largest multi-terabit global networks, with an extensive dark fiber footprint that connects them all.

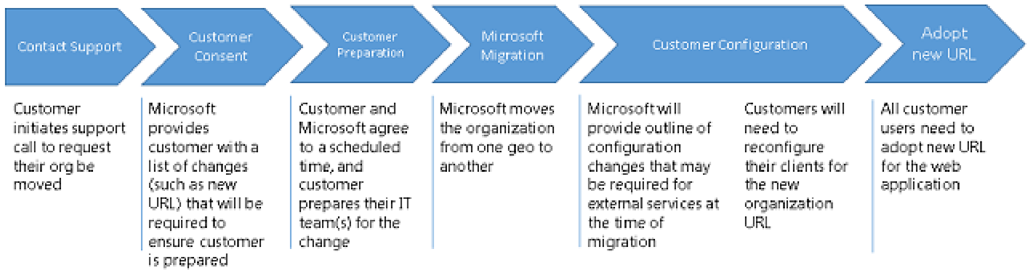
Microsoft provides cloud services to customers 24x7x365, and the Microsoft Cloud Infrastructure and Operations team designs, builds, operates and helps secure every facet of the infrastructure. Since opening our first datacenter in 1989, we've invested more than $15 billion on our infrastructure and remain focused on delivering reliable, scalable, and secure online services.

## Migration

You may request migration to the Canada datacenter by submitting a technical support request. If you're an existing Dynamics 365 (online) customer with a billing address mapping to Canada, review the information in this topic to understand the move process.

#### How do I request my instance to be moved to Canada?

You can request a move to the new Canada datacenter by submitting a technical support request through the Dynamics 365 admin center or by calling Microsoft Support. Please select the Data Management topic and Data Center Migration Request sub-topic to ensure your request receives the best possible routing. A Dynamics 365 (online) support engineer will assist you in verifying required prerequisites and provide guidance throughout the move process.




*Customers will be required to go through more steps depending on the type of transition.

**How will Microsoft engage with me on the migration?**

Once you have been scheduled for migration, a member of the Microsoft Support team will work directly with you to discuss scheduling and any other issues that may come up during the migration.

**If I am scheduled for an update to CRM Online 2015 Update or CRM Online 2015 Update 1, will Microsoft apply the update at the same time as their migration to the Canada datacenter?**

You must be updated to Microsoft Dynamics CRM Online 2015 Update or later prior to migrating to the Canada datacenter. Customers can schedule their update. For more information, see Manage Dynamics 365 (online) updates.

**If I have both Office 365 services and Dynamics 365 (online), how will migration be handled?**

The migration of each service will be handled separately. For Dynamics 365 (online), you'll be able to choose their migration date and time. Microsoft will work with you to schedule the migration. For Office 365 scheduling and migration, see New datacenter regions for Office 365.

**Can I move Office 365 and Dynamics 365 (online) at the same time?**

The move process for each service is handled separately. The Dynamics 365 (online) move can be requested to coincide with the Office 365 Admin Center move.

**If my content is stored in the Canada datacenters, can I access my content for work from locations outside of Canada?**

Yes. If you're outside of Canada and sign in to Dynamics 365 (online) as an authenticated user, you'll be able to access the relevant data.

# Licensing and pricing

**Will all versions of Dynamics 365 (online) be available?**

Customers will be able to purchase all licenses that are currently available in the market today. Please see local availability at Microsoft Dynamics CRM Solutions. Global pricing can be found at Microsoft Dynamics Pricing List.

**How will a customer who has an existing volume license agreement outside of Canada be billed if they add a new tenant to their agreement that resides in Canada?**

The additional seats will be invoiced at the same rate on the customer's invoice. The business desk will need to provide a multi-tenant amendment to provide an additional tenant in Canada.

**If I started a trial outside of Canada and before general availability, will I be moved to the Canada datacenter after general availability?**

No. Trials will remain in the geography where they were initiated. You may choose to start a new trial that will provision in the Canada datacenter.

**If I choose to convert a trial to a paid subscription, where the trial was created in a geographic region outside of Canada prior to general availability, will my subscription tenant and instance be moved to the Canada datacenter?**

No. If you choose to convert a trial that was created in a geographic region outside of Canada before general availability, your trial will be converted and billed in the geography where it was initiated. If the trial was originally deployed in Canada and converted to a paid subscription, it will continue to be deployed in Canada.

**If a customer creates a trial in the Canada datacenter after general availability, will they be taxed for the trial?**

No. Trials are free for 30 days.

**See also**

Office 365 datacenters now available in Canada
New datacenter regions for Dynamics 365 (online)

# About the Microsoft Cloud Germany datacenter

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 8.x

Microsoft Dynamics 365 Germany address the needs of the most regulated customers in Germany, the European Union (EU), and the European Free Trade Association (EFTA). The German datacenter delivers services that bring together the best of Microsoft in productivity, collaboration, intelligence and platform to grow, evolve and transform your business.

> **NOTE**
>
> Due to the unique nature of Microsoft Dynamics 365 Germany, there are some features that have not yet been enabled. The key sales, marketing, and service features for Dynamics 365 will be the same as in other regions. However, there may be external factors that are made available in other clouds, but will not be available to German cloud customers at this time.
>
> Please check back for the latest information.

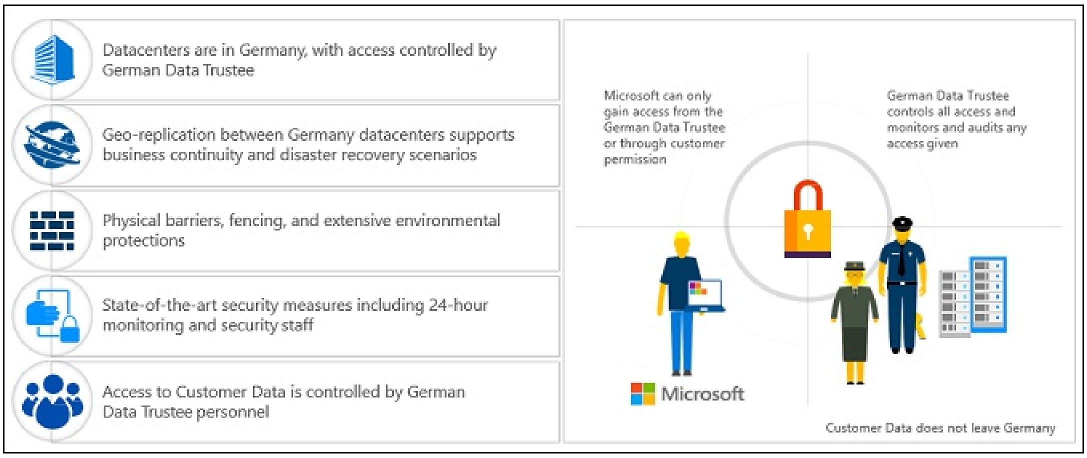
## German Data Residency

Customer Data will be stored at rest in two independent, geographically dispersed datacenter locations in Germany. Replication of Customer Data across these German datacenters ensures data remains in Germany even in backup, business continuity, and disaster recovery scenarios.

Customer Data means all data that are provided to Microsoft by, or on behalf of the customer through the use of Dynamics 365.

Note the following:

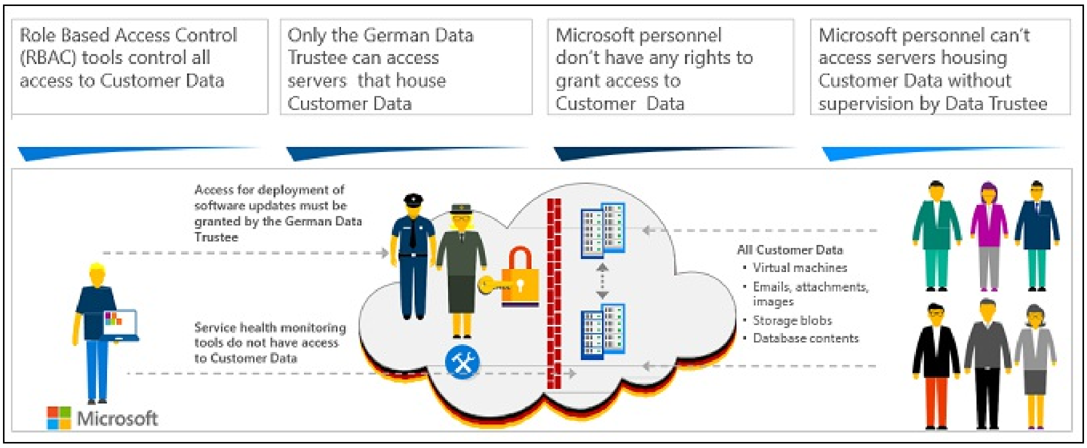
- Customer Data is stored at rest in Germany
- Access control is through a German Data Trustee.
- All security and compliance capabilities of Dynamics 365 are included.




## German Data Trustee

The German Data Trustee controls access to Customer Data by anyone except the customer or the customer's end users. This means that access to Customer Data or the infrastructure on which Customer Data resides for performing operational tasks must be granted and supervised by the German Data Trustee, or else directly by the customer.

The German Data Trustee may also perform non-data specific tasks related to day-to-day datacenter operations.




## Germany Service Delivery

The following describe current and planned service availability. We will continue to add more services as they become available.

**Dynamics 365 Germany offers the following online services:**

- Microsoft Dynamics 365 for Sales
- Dynamics 365 for Customer Service
- Dynamics 365 Customer Engagement Plan

Customer Engagement Plan is a user subscription that includes Microsoft Dynamics 365 for Sales, Dynamics 365 for Customer Service, Field Service, Project Service, and Team Members. Please note that Dynamics 365 for Field Service and Dynamics 365 for Project Service Automation cause location data to be transmitted to Bing Maps outside of Germany.

**Coming soon:**

- Azure ExpressRoute

**Some online services or add-ons are not yet offered, such as:**

**Online services:**

- Dynamics 365 for Finance and Operations
- Dynamics for Financials
- Microsoft Flow
- Microsoft Social Engagement

**Add-ons and Integration**

- Dynamics 365 - Gamification
- Mobile offline synchronization
- Relevance Search
- Azure Machine Learning integration
- Bing Maps integration
- Office 365 Groups integration

- Power BI integration

## Compliancy and certifications

Microsoft Dynamics 365 Germany is built in adherence to the cloud security and compliance standards and commitments of Dynamics 365.

Microsoft Dynamics 365 Germany is planned to be covered under existing audits.

- Uses the same security and controls
- Includes ISO 27001, 27018, and SOC 1 and 2

Data centers undergo audits like any other expansion.

The additional Data Trustee controls in Microsoft Dynamics 365 Germany will be evaluated by independent assessors as part of our annual ISO and SOC.

Microsoft Dynamics 365 Germany includes client software applications that are installed and run on an end user's device ("client software applications"), such as Dynamics 365 for Outlook, Dynamics 365 for phones and Dynamics 365 for tablets, and the Unified Service Desk for Dynamics 365. Client software applications do not operate exclusively in German data centers and may enable an end user to access online services that are not German Online Services. For purposes of your agreement with Microsoft, client software applications are not German Online Services. German Data Residency commitments and access control by German Data Trustee apply only to the German Online Services.

Apps available in a Microsoft app store are provided by either Microsoft or a third-party app publisher and these are subject to a separate privacy statement and terms and conditions. Data provided through the use of a Microsoft app store and any app may be accessible to Microsoft or the third-party app publisher, as applicable, and transferred to, stored, and processed in the United States or any other country or region where Microsoft or the app publisher and their affiliates or service providers maintain facilities. Please work with the app publisher to make sure it meets requirements for your Microsoft Dynamics 365 Germany deployment.

## Privacy notice

## Mapping functions for Dynamics 365 Customer Engagement Plan

Field Service and Project Service Automation have key functions that rely on location. For example, the location of Service Accounts (which define where services or tasks take place) or the starting/ending location of Resources (people performing services or tasks). In order for the system to show these on a map - or to calculate distances between points - it's necessary to use a mapping service (in this case Bing Maps).

Following is the workflow to and from the Bing Maps service:

| FROM DYNAMICS 365 | BING MAPS RETURNS | NOTE |
|---|---|---|
| Address (account or resource) | Latitude and longitude of the address (location) | This is referred to as "geo-coding" of an address. |
| Set of locations (latitude/longitude) | Distance between locations | This can be used to find optimal routes for resources or to calculate travel times. |
| Set of locations (latitude/longitude) | Map view with the locations as pins on the map | This is used to view the accounts and resources in a map view. |

**NOTE**

Aside from the data referenced above, no other data is sent to the Bing Maps service.

### See also

Microsoft Azure Germany

New datacenter regions for Dynamics 365 (online)

# About the Microsoft Cloud India datacenter

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

## New Microsoft Cloud Services in India

**What is Microsoft announcing?**

We're announcing the general availability of Dynamics 365 (online) served from new datacenter regions in Pune and Chennai, joining Azure and Office 365 in providing the trusted Microsoft Cloud in India.

Built on foundational principles of security, privacy and control, compliance, and transparency, the Microsoft Cloud delivers trusted cloud services to enable people and organizations to achieve more. Providing flexible platform and productivity solutions Azure, Office 365, and now Dynamics 365 (online), the local Microsoft Cloud is designed to fuel innovation and accelerate India's digital transformation.

**What is the benefit to customers?**

The new local Microsoft Cloud enables data residency for customers in India, bringing enterprise-grade reliability and performance to regulated industries and other businesses. This includes data replication in multiple regions within India for business continuity, reduced network distance, and the option of a private connection to the cloud with Azure ExpressRoute. The Microsoft Cloud in India comes with the same deep commitment to high availability as our other regions, including a financially backed service level agreement of 99.9%.

For Dynamics 365 (online), data residency means that most customer data will be kept within India, except for Azure Active Directory data. For the definition of customer data and details on our data flow maps in Geo, see the Microsoft Dynamics 365 Trust Center.

**Where are the Microsoft Cloud India regions?**

The Dynamics 365 (online) India Geo will consist of datacenters in Central India (Pune) and South India (Chennai).

**How do I find what country or region my account is under?**

1. Sign in to https://portal.office.com.
2. In the upper-right corner of the Office 365 admin center menu bar, click your organization.


3. On the **Company profile** page, your account country/region is listed under **Country or region**.

## Dynamics 365 (online) service overview

**Will multi-geo instances be available to customers in India?**

Yes, multi-geo instances will be supported for India as long as the tenant is provisioned in India. For customers not located in India who want to provision an instance of Dynamics 365 (online) within the India datacenter, they must first purchase a tenant for an organization located in India and then the tenant can be provisioned in India.

Availability of multi-geo instance support will be limited in the initial rollout to a fixed number of eligible customers. We'll continue to expand this capacity over time. Read more on how to create and edit multi-geo instances.

**Will the standard Dynamics 365 Online service level agreements be offered?**

Yes, the standard Dynamics 365 (online) service level agreements (SLAs) will apply to the India regions, just as they do in our other regions around the world.

> **NOTE**
>
> The SLA for Dynamics 365 (online) doesn't cover Microsoft Social Engagement.

**Will Microsoft Dynamics Marketing, Social Engagement, and Parature be available in the India datacenters?**

These services are available for purchase in India, however, these services are provisioned regionally at this time.

**What is the customer experience if I use both Dynamics CRM Online from the India regions while using Microsoft Dynamics Marketing, Microsoft Social Engagement, and Parature from other regions?**

The customer experience will be unchanged, the workloads for the other services will simply be provisioned from other regions.

**When will ExpressRoute be available in India for Dynamics 365 Online customers, and through which partners?**

ExpressRoute is currently available in India. View a current list of ExpressRoute locations and partners. Microsoft is currently working to enable customers to use ExpressRoute with Dynamics 365 (online) from the India regions.

**Where can I find more about Microsoft Dynamics 365 (online) security, data privacy, and compliance?**

You can find more information at the Microsoft Dynamics 365 Trust Center.

**Where can I find out more about the physical infrastructure for Dynamics 365 (online)?**

These services are hosted in the Microsoft cloud infrastructure comprising more than 100 globally distributed datacenters, edge computing nodes, and service operations centers. This infrastructure is supported by one of the world's largest multi-terabit global networks, with an extensive dark fiber footprint that connects them all.

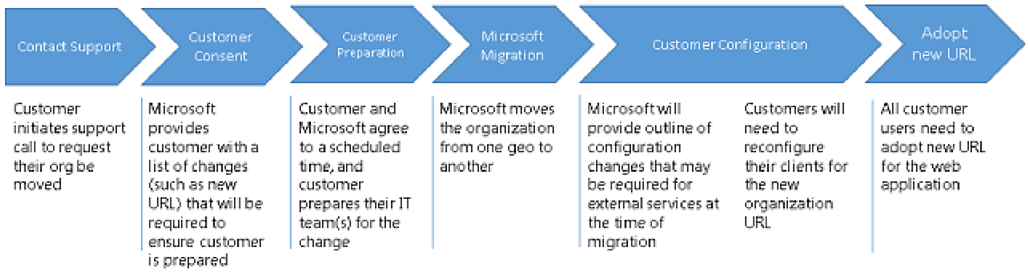
Microsoft provides cloud services to customers 24x7x365, and the Microsoft Cloud Infrastructure and Operations team designs, builds, operates and helps secure every facet of the infrastructure. Since opening our first datacenter in 1989, we've invested more than $15 billion on our infrastructure and remain focused on delivering reliable, scalable, and secure online services.

# Migration

You may request migration to the India datacenter by submitting a technical support request. If you're an existing Dynamics 365 (online) customer with a billing address mapping to India, review the information in this topic to understand the move process.

**How do I request my instance to be moved to India?**

You can request a move to the new India datacenter by submitting a technical support request through the Dynamics 365 admin center or by calling Microsoft Support. Please select the Data Management topic and Data Center Migration Request sub-topic to ensure your request receives the best possible routing. A Dynamics 365 (online) support engineer will assist you in verifying required prerequisites and provide guidance throughout the move process.




*Customers will be required to go through more steps depending on the type of transition.

**How will Microsoft engage with me on the migration?**

Once you have been scheduled for migration, a member of the Microsoft Support team will work directly with you to discuss scheduling and any other issues that may come up during the migration.

**If I am scheduled for an update to CRM Online 2015 Update or CRM Online 2015 Update 1, will Microsoft apply the update at the same time as their migration to the India datacenter?**

You must be updated to Microsoft Dynamics CRM Online 2015 Update or later prior to migrating to the India datacenter. Customers can schedule their update. For more information, see Manage Microsoft Dynamics CRM Online Updates.

**If I have both Office 365 services and Dynamics 365 (online), how will migration be handled?**

The migration of each service will be handled separately. For Dynamics 365 (online), you'll be able to choose their migration date and time. Microsoft will work with you to schedule the migration. For Office 365 scheduling and migration, see New datacenter regions for Office 365.

**Can I move Office 365 and Dynamics 365 (online) at the same time?**

The move process for each service is handled separately. The Dynamics 365 (online) move can be requested to coincide with the Office 365 Admin Center move.

**If my content is stored in the India datacenters, can I access my content for work from locations outside of India?**

Yes. If you're outside of India and sign in to Dynamics 365 (online) as an authenticated user, you'll be able to access the relevant data.

# Licensing and pricing

**Will all versions of Dynamics 365 (online) be available?**

Customers will be able to purchase all licenses that are currently available in the market today. Please see local availability at Microsoft Dynamics CRM Solutions. Global pricing can be found at Microsoft Dynamics Pricing List.

**How will a customer who has an existing volume license agreement outside of India be billed if they add a new tenant to their agreement that resides in India?**

The additional seats will be invoiced at the same rate on the customer's invoice. The business desk will need to provide a multi-tenant amendment to provide an additional tenant in India.

**If I started a trial outside of India and before general availability, will I be moved to the India datacenter after general availability?**

No. Trials will remain in the geography where they were initiated. You may choose to start a new trial that will provision in the India datacenter.

**If I choose to convert a trial to a paid subscription, where the trial was created in a geographic region outside of India prior to general availability, will my subscription tenant and instance be moved to the India datacenter?**

No. If you choose to convert a trial that was created in a geographic region outside of India before general availability, your trial will be converted and billed in the geography where it was initiated. If the trial was originally deployed in India and converted to a paid subscription, it will continue to be deployed in India.

**If a customer creates a trial in the India datacenter after general availability, will they be taxed for the trial?**

No. Trials are free for 30 days.

## See also

Announcing the availability of Office 365 from local datacenters in India

New datacenter regions for Dynamics 365 (online)

# About the Microsoft Cloud Japan datacenter

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You may request migration to the Japan datacenter upon datacenter availability (March 2015).

If you're an existing Dynamics 365 (online) customer with a billing address mapping to a new data center region, review the information in this topic to understand the move process:

## Japan GEO expansion announcement

**What is Microsoft announcing?**

Dynamics 365 (online) is now available as a service within the Japan datacenters.

In addition, Dynamics 365 (online) is currently available in 130 markets and 44 languages enabling us to sell side-by-side with Office 365 in the majority of the markets worldwide. With the inclusion of Japan, our global customers will now be served from datacenters in 5 global regions around the world.

This marks an important step for on our cloud journey to serve our customers and partners in Japan (Japan GEO). By bringing Dynamics 365 (online) to the local region we will be able to serve our customers more effectively and with better performance while also ensuring compliance with local requirements.

**What prompted Microsoft to undertake this geographic expansion of Dynamics 365 (online)?**

In order to better serve customer needs for data residency and reduced latency, we continually evaluate where we should expand availability around the world. We are committed to long-term investment in Dynamics 365 (online) and expansion over time.

Dynamics 365 (online) is currently available in 130 markets and 44 languages enabling us to sell side-by-side with Office365 in the majority of the markets around the globe.

This global expansion will enable us to deliver on the promise of increasing sales productivity while allowing our customers to sell effectively, market smarter, and provide care everywhere to offer amazing experiences to their customers.

**What are the future geographic expansion plans for Dynamics 365 (online)?**

Geographic expansion of Dynamics 365 (online) is a high priority and we're constantly evaluating market needs. While we have no additional information or specifics on future plans to announce at this time, we will update if and when we have something to share.

## Datacenter overview

**Where are the datacenters located in the Japan Geo?**

The Dynamics 365 (online) Japan Geo will consist of datacenters in the Japan East and Japan West.

**Will the standard Dynamics 365 (online) SLA be offered at general availability launch?**

Yes, on the date of general availability, the standard 99.9% financially backed SLA for Dynamics 365 (online) will apply, just as it does in our other regions around the world. Note: the SLA for Dynamics 365 (online) does not cover Microsoft Social Engagement.

**Do existing Dynamics 365 (online) customers have the choice to keep their service from being moved to the**

**Japan Datacenters?**

Existing Dynamics 365 (online) customers will remain in the datacenters where they are currently deployed unless they request to be moved. Microsoft reserves the right to make a unilateral decision to migrate accounts based on multiple conditions. All new customers purchasing Dynamics 365 (online) in Japan will be provisioned within the Japan datacenter.

**How do I request my instance to be moved to the Japan datacenter?**

You can request a move to the new Japan datacenter by submitting a technical support incident through the Office 365 Admin Center.

1. Sign in to https://portal.office.com.
2. Go to **Support** > **Service Requests** > +
3. Choose **More** > **Dynamics 365 Online**
4. For **Feature**, select **Data Management**. For **Symptom**, select **Data Center migration request**.
5. Fill in the rest of the information to submit a service request.

A Dynamics 365 (online) support engineer will assist you in verifying required prerequisites and provide guidance throughout the move process.

**How will Microsoft engage with me on the migration?**

Once you have been scheduled for migration, a member of the Microsoft Support team will work directly with you to discuss scheduling and any other issues that may come up during the migration.

**If I am scheduled for an update to Microsoft Dynamics CRM Online 2015 Update or CRM Online 2015 Update 1, will Microsoft apply the update at the same time as their migration to the Japan datacenter?**

You must be updated to Microsoft Dynamics CRM Online 2015 Update or later before migrating to the Japan datacenter. Customers can schedule their update. For more information, see Manage Microsoft Dynamics 365 (online) Updates.

**If I have both Office 365 services and Dynamics 365 (online), how will migration be handled?**

The move of each service will be handled separately and customers will be fully supported even if one service has been moved and the other has not. For Dynamics 365 (online), customers will be able to choose their move date and time. Microsoft will work with the customer to schedule the move. For Office 365, customers will be notified through the message center about the move timeline, but the large number of existing customers means that individual scheduling is not possible. For Office 365 scheduling and migration, see New datacenter regions for Office 365.

**Can I move Office 365 and Dynamics 365 (online) at the same time?**

The move process for each service is handled separately, but the Dynamics 365 (online) move can be scheduled to coincide with the Office 365 Admin Center move if requested.

**Will multi-geo instances be available to customers in Japan?**

Multi-geo instances will be supported for Japan. Availability of multi-geo instance support will be limited in the initial rollout to a fixed number of eligible customers upon request, and we'll continue to expand over time.

For additional guidance regarding multiple tenants and multiple instances, see Multiple online instances or tenants. This link will be updated with the Microsoft Dynamics CRM Online 2015 Update launch.

**How will this affect Dynamics 365 (online) users or partners?**

Regardless of where Dynamics 365 (online) is provisioned, you'll have the ability to determine which of your users will have access to those services based on how you configure Dynamics 365 (online).

**Will Dynamics 365 (online) be available on Azure Infrastructure as a Service (IaaS) in Japan?**

At this time Dynamics 365 (online) is only available for dev/test scenarios and isn't supported for production use cases. Developers can leverage their MSDN subscription and Azure credits for dev/test scenarios. Note: we recently announced intent to support Dynamics 365 (online) on Azure IaaS but we are dependent on Azure Premium Storage availability being available in each geographic region. Azure's Limited Public Preview will only be available in the U.S. and part of Europe. We do not have any additional information regarding other geos or general availability at this time.

#### Where can I find more about Dynamics 365 (online) security, data privacy, and compliance?

The Dynamics 365 (online) Trust Center will be updated as needed when the Japan datacenters launch into general availability. To see the current version of the Trust Center, see: Microsoft Dynamics 365 Trust Center.

#### Will Microsoft Dynamics Marketing, Social Engagement, and Parature, from Microsoft be available in the Japan datacenters?

These services will be available for purchase in the local market but will be delivered outside of the Japan datacenters at this time. Note: Dynamics 365 (online) leverages Azure Active Directory and Multi-Factor Authentication, which don't offer a region choice to customers.

## Pricing

#### How will billing be handled for customers whose instances are moved from an existing tenant located outside of Japan to a new tenant in Japan?

Billing is related to the country/region where the customer signs up for the Dynamics 365 (online) service, not where the service is deployed.

#### Will all versions of Dynamics 365 (online) be available?

You'll be able to purchase all licenses that are currently available in the market today. For more information, see: Microsoft Dynamics 365 Pricing List.

#### See also

Office 365 now available from datacenters in Japan
Japan datacenter - Office 365 FAQ
New datacenter regions for Dynamics 365 (online)

# Geo to geo migrations

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

We continue to open new datacenter regions for Dynamics 365 (online) for business services, and to add datacenters to existing regions.

The Geo Migration feature for Dynamics 365 (online) will allow customers to move their instances in a single tenant from one region to another. There are no user-interface changes or version changes as part of this move. In the case of a Dynamics 365 (online) instance residing in an Office 365 instance in a single tenant, moving the Dynamics 365 (online) instance doesn't move the Office 365 instance; they are separate services. Your Dynamics 365 (online) instance will still appear in your tenant alongside the Office 365 instance.

> **IMPORTANT**
> For versions prior to Dynamics 365 (online), version 9.0, you can move individual Dynamics 365 (online) instances from one geographical region to another. When you do so, your tenant becomes a multiregional tenant. Regional features are enabled in the Dynamics 365 admin center.
>
> To request a regional migration, please contact your account manager or see Technical Support.
>
> Dynamics 365 (online), version 9.0 does not currently support regional migration. Check back later for availability.

## Impact of migrating

Moving an instance to a different region changes your tenant to be multiregional - enabling regional features in the Dynamics 365 admin center.

The other significant change is to your organization URL. Each of the Dynamics 365 (online) regional datacenters has a unique identifier in the URL. When your organization is moved from one regional datacenter to another this identifier will change. For example:

- South America (LATAM/SAM) = .crm2.dynamics.com
- Canada (CAN) = .crm3.dynamics.com
- Europe, Middle East, Africa (EMEA) = .crm4.dynamics.com
- Asia Pacific (APAC) = *.crm5.dynamics.com
- Australia (OCE) = *.crm6.dynamics.com
- Japan (JPN) = *.crm7.dynamics.com
- India (IND) = *.crm8.dynamics.com
- United Kingdom (UK) = *.crm11.dynamics.com

More information: Direct sign in to Dynamics 365 (online) and Discover the URL for your organization using the Organization Service

For example, if your existing organization URL is https://myorg.crm**5**.dynamics.com and you request it to be moved to Australia, the new organization URL will be https://myorg.crm**6**.dynamics.com.

You'll need to update any direct references to your Dynamics 365 (online) organization URL.

> **NOTE**
> Organization URLs must be unique. If your organization name has already been reserved in the destination datacenter, it won't be available. In the unlikely event this happens, we will work with you to decide how to proceed.

To see the datacenter regions, go to Where is my data? and then click **Select Your Region**.

The following topics have information that could be helpful to understand the move process:

- New datacenter regions for Dynamics 365 (online)
- About Microsoft Cloud Australia
- About Microsoft Cloud Canada
- About the Microsoft Cloud Germany datacenter
- About Microsoft Cloud Japan
- About Microsoft Cloud India

## How the move works

You'll be provided with a list of prerequisites and post-requisites for your migration. For more information, download Geo to geo migration information for CRM Online. The following table describes what Microsoft does before, during, and after your move.

| | BEFORE THE MOVE | DURING THE MOVE | AFTER THE MOVE |
|---|---|---|---|
| **What Microsoft does** | **Notification**<br><br>Your support representative or Account Manager will work with you to request a move and scheduling. | **Cut-over**<br><br>Cut-over times for each service depend on the number of users and the amount of data. This step can take 1 to 6 hours for smaller organizations, but may take up to 48 hours for large organizations. The cut-over is done during the evening or over a weekend.<br><br>There is a step that will require your involvement, which is to re-enter the encryption key in Dynamics 365 (online). This can happen at a time that suits you but the migration process will be on hold until you complete this action. | **Notification and support**<br><br>You will be alerted by email or telephone when your instance is migrated to the new datacenter.<br><br>After your geo has migrated you can perform the post requisite steps - primarily changing your new URLs with any associated Dynamics 365 plugins or services. |

We will adhere to the terms of the Microsoft Online Services Service Level Agreement for all moves.

**See also**

Dynamics 365 (online) terminology
Add and edit multiregional instances
Manage Microsoft Dynamics 365 (online) instances

# Set up an organization

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section describes how to set up your Dynamics 365 organization. You will learn about managing business units and sites, adding resources and selecting language options.

**See also**

Terminology used in the product and documentation

# Regional and other business management settings

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section covers configuring regional settings for everyone in your organization.

# Customize regional options

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can customize how numbers, currencies, times, and dates appear to everyone in your organization.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   a. Follow the steps in View your user profile.

   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Click **System Settings**.

4. Click the **Formats** tab.

5. From the **Current Format** list, select the language and country or region, and then click **Customize**.

6. In the **Customize Regional Options** dialog box, you can change the default settings for the selected format. View how the changes will look in the preview boxes.

   - Click the **Number** tab to change the decimal symbol, digit grouping symbol, digit groups, and negative numbers.

   - Click the **Currency** tab to change the currency format, negative currency amounts, and number of decimal places.

   - Click the **Time** tab to change the time format, time separator, and notation for morning and afternoon.

   - Click the **Date** tab to set the type of calendar, first day of the week, first week of the year, formats for long and short dates, and whether or not to show week numbers in calendar views.

   - Click **Apply** to apply the changes and continue working in the dialog box, or click **OK** to save the changes and close the dialog box.

7. Click **OK**.

**See also**

System Settings dialog box - Formats tab

# Manage transactions with multiple currencies

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Currencies determine the prices for products in the product catalog and the cost of transactions, such as sales orders. If your customers are spread across geographies, add their currencies in Dynamics 365 to manage your transactions. Add the currencies that are most appropriate for your current and future business needs.

## Add a currency

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.

   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Business Management**.

3. Click **Currencies**.

4. Click **New**.

5. Fill in the information, as required.

| FIELD | DESCRIPTION |
|---|---|
| **Currency Type** | - **System** - Select this option if you want to use the currencies available in Dynamics 365. To search for a currency, click the **Lookup** button next to **Currency Code**. When you select a currency code, **Currency Name** and **Currency Symbol** are automatically added for the selected currency.<br>- **Custom** - Select this option if you want to add a currency that's not available in Dynamics 365. In this case, you must manually enter the values for **Currency Code**, **Currency Precision**, **Currency Name**, **Currency Symbol**, and **Currency Conversion**. |
| **Currency Code** | Short form for the currency. For example, **USD** for United States Dollar. |
| **Currency Precision** | Type the number of decimals that you want to use for the currency. You can add a value between 0 and 4. **Note:** If you've set a precision value in the **System Settings** dialog box, that value will appear here. More information: System Settings dialog box - General tab. |

| FIELD | DESCRIPTION |
|---|---|
| **Currency Name** | If you selected a currency code from the list of available currencies in Dynamics 365, the currency name for the selected code is displayed here. If you selected **Custom** as the currency type, type the name of the currency. |
| **Currency Symbol** | If you selected a currency code from the list of available currencies, the symbol for the selected currency is displayed here. If you selected **Custom** as the currency type, enter the symbol for the new currency. |
| **Currency Conversion** | Type the value of the selected currency in terms of one US dollar. This is the amount at which the selected currency converts to the base currency. **Important:** Make sure you update this value as frequently as required to avoid any inaccurate calculations in your transactions. |

6. When you're done, on the command bar, click **Save** or **Save and Close**.

> **TIP**
> To edit a currency, click the currency, and then enter or select the new values.

# Delete a currency

1. Click **Settings** > **Business Management**.
2. Click **Currencies**.
3. From the list of currencies displayed, select the currency to delete.
4. Click **Delete** ✕.
5. Confirm the deletion.

> **IMPORTANT**
> You can't delete currencies that are in use by other records; you can only deactivate them. Deactivating currency records doesn't remove the currency information stored in existing records, such as opportunities or orders. However, you won't be able to select the deactivated currency for new transactions.

### See also

System Settings dialog box - General tab

# Regional and language options for your organization

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Enable languages in your organization to display the user interface and Help in a language that's different from the base language.

> **IMPORTANT**
> If you're running Dynamics 365 for Outlook, you must download one or more Language Packs before you can enable additional languages.

The following table shows tasks that are associated with changing regional and language options for your organization.

| TASK | DESCRIPTION |
|---|---|
| **Set the base language** | The base language determines default settings for regional and language options in Dynamics 365. After the base language is set, you can't change it. |
| **Enable or disable languages** | You can enable or disable available languages in the **Settings** area. |
| **Add and remove currencies** | Similar to setting the base language, you select your organization's base currency during the purchasing process for a subscription to Dynamics 365. After the base currency is set, you can't change it.<br><br>However, if your organization uses more than one currency to track financial transactions, you can add currencies. |
| **Deactivate or activate currency records** | You can't delete currency records that are being used by other records, such as opportunities or invoices. However, you can deactivate currency records so they won't be available for future transactions. |

## Enable the language

Before users can start using a Language Pack to display a language, the Language Pack must be enabled in your Dynamics 365 organization.

1. Start the Dynamics 365 web application. You'll need a System Administrator security role or equivalent privileges for the Dynamics 365 organization that you want to provision a Language Pack for.
2. Go to **Settings** > **Administration**.
3. Click **Languages** to open the **Language Settings** dialog box. Here you'll see each Language Pack installed in your Dynamics 365 deployment, with a check box to the left of each listed Language Pack
4. For each Language Pack that you want to provision (enable), select the check box next to it. For each

Language Pack that you want to unprovision (disable), clear the check box.

5. Click **Apply**.

6. Click **OK** on any confirmation dialog boxes that open.

> **NOTE**
>
> It may take several minutes for Dynamics 365 to provision or unprovision the languages.

7. To close the **Language Settings** dialog box, click **Close**.

   Repeat the previous steps for each organization in your Dynamics 365 deployment.

## Select the language to display the user interface and Help

Each user selects the language to display in both the Dynamics 365 web client and Dynamics 365 for Outlook applications.

> **IMPORTANT**
>
> For Microsoft Dynamics 365 for Outlook, you must download and install the Language Packs before you can select them.

1. Sign in to Dynamics 365 and open the **Set Personal Options** page, as follows:

   - If you're using the Dynamics 365 web client, click the **Settings** button , and then click **Options**.

   - If you are using Dynamics 365 for Outlook, on the top menu bar, choose **Dynamics 365**, and then click **Options**.

2. Choose the **Languages** tab.

3. In the **User Interface Language** list, select the language in which you want to display Dynamics 365.

4. In the **Help Language** list, select the language in which you want to display Microsoft Dynamics 365 Help.

5. To save your changes and close the dialog box, click **OK**.

> **NOTE**
>
> In Dynamics 365 for Outlook, the user language settings only apply to Dynamics 365 for Outlook features, such as the user interface display of the **Dynamics 365** menu, and don't affect other areas of Office Outlook. To display all of the Dynamics 365 for Outlook user interface or Help in multiple languages, you need to install one or more Microsoft OfficeLanguage Packs. More information: Office 2013 Language Options.

**See also**

Add resources to a site

# Work with fiscal year settings

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can set the fiscal year period, and how it's displayed, for your organization.

> **IMPORTANT**
> After you set the fiscal year options, you can't change them. Fiscal year options affect the way in which your organization's data is stored in Dynamics 365.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Business Management**.
3. Click **Fiscal Year Settings**.
4. Type information in the text boxes.
   - In the **Start Date** box, select the date to start the fiscal year.
   - In the **Fiscal Period Template** drop-down list, select how your fiscal year is divided.
   - In the **Fiscal Year** drop-down list, select how you want to display the fiscal year.
   - In **Name Based On** drop-down list, select whether the fiscal year name is displayed on the start or end of the fiscal year.
   - In the **Fiscal Period** drop-down list, select how you want to display the fiscal period.
   - In the **Display As** drop-down list, select how you want the fiscal year abbreviation and the year to appear.
5. Click **OK**.

### See also

Set up sales territories to organize business markets by geographical area

# Set privacy preferences for an organization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Manage users' data privacy by controlling when to send error notifications, and also let users know how their privacy is protected by displaying your organization's own privacy statement instead of the one from Microsoft.

## Set error reporting preferences for the organization

When errors occur in the product, data about the problem is sent to Microsoft. This data – an error report - allows Microsoft to track and address errors relating to Dynamics 365. You can help Microsoft improve products and services when you allow the system to send these error reports.

By default, individual users in Dynamics 365 have a measure of control over whether to send error reports to Microsoft. But you, as an administrator, can override their preferences and set up the error reporting preferences for the entire organization.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

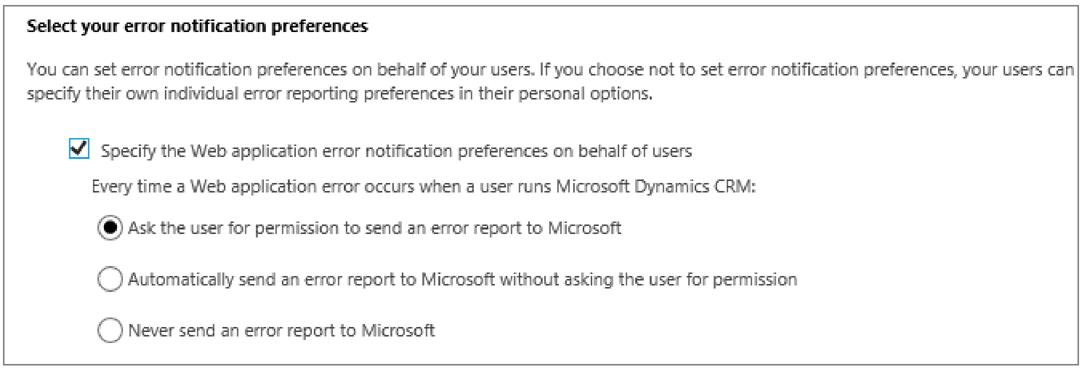
   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **Privacy Preferences**.

4. Under **Select your error notification preferences**, choose **Specify the Web application error notification preferences on behalf of users**, and then select one of the options.


   When you use this setting, you can control error reporting for the entire organization by:

   - Not allowing users to make changes in how error reporting occurs.
   - Changing the default behavior for how error reporting happens.

## Replace the privacy statement for the organization

By default, the Microsoft privacy statement is always shown to users with an administrator role only, and not to other (business) users. As an administrator, you can add a link to specify your organization's privacy statement, which is then shown to other users in your organization.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

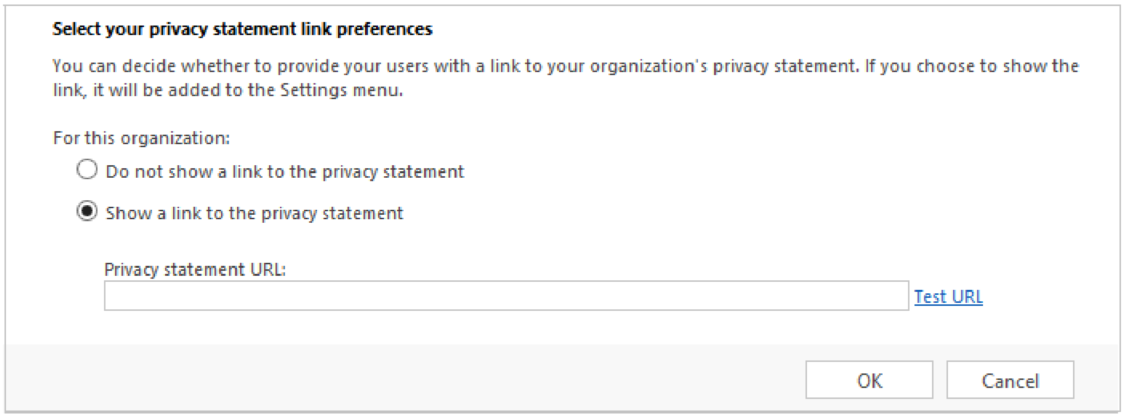
   Check your security role

   - Follow the steps in View your user profile.
   - Don’t have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **Privacy Preferences**.

4. Under **Select your privacy statement link preferences**, choose **Show a link to the privacy statement**, and then, in the **Privacy statement URL** box, type the link of the webpage you want to show.




5. To make sure the link is correct, choose **Test URL**.

   After you add the privacy statement URL, the link directs all Dynamics 365 users to the specified link.

> **NOTE**
> Any user with the System Administrator security role will always see the Microsoft privacy statement and not the organization’s privacy statement.

**See also**

Get Help from the Microsoft Dynamics 365 Community

# Set up sales territories to organize business markets by geographical area

10/11/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Improve sales potential and revenues by creating territories for customer and market segments in Dynamics 365. Then assign appropriate sales people to handle the sales and revenue opportunities for those territories.

Sales territories improve the sales potential because the members of a territory are focused on the services or sales within that territory. You can associate the financials directly with a territory and its members, which simplify business analysis. Also, based on the sales territory type and size, you can define sales methodologies and the training required for those locations.

## Create a sales territory (Sales Hub app)

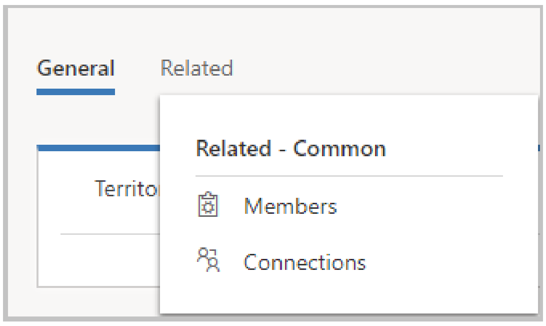
1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.
2. Select the Site map icon, then select ellipsis, and then select **Sales Territories**.
3. To create a new sales territory, on the command bar, select **New**.
4. In the sales territory form, hill in your information.

   a. **Name**. Enter the geographical name for the territory such as the name of a city, country/region, or a state.

   b. **Manager**. Enter the name of the user who is the manager for this territory. This person would typically assign leads to salespeople.

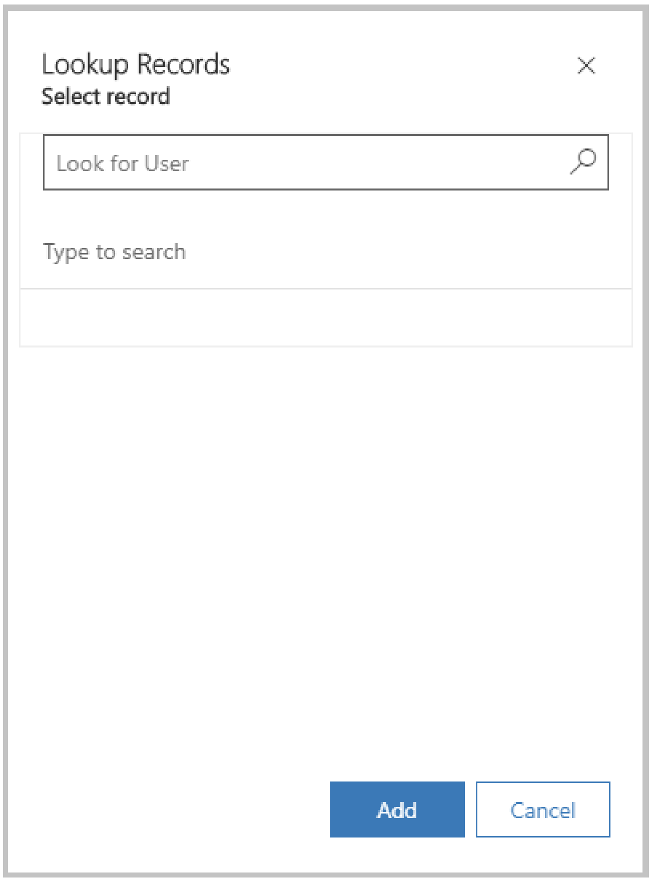
   > **IMPORTANT**
   > You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.

   c. **Description**. Enter any details that you'd like to include for this territory, for example, "Sales territory created for education and training."
5. When you're done, on the command bar, select **Save**.
6. Select the **Related** tab, and then select **Members**.



7. On the **Members** tab, select **Add members**.

8. In the **Lookup Records** pane, select the search icon , select a user record, and then select **Add**.




9. Select **Save**.

# Create a sales territory (Sales app)

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Business Management**.

3. Choose **Sales Territories**.

4. On the command bar, choose **New**.

5. Fill in your information.

   - **Name**. Enter the geographical name for the territory such as the name of a city, country/region, or a state.
   - **Manager**. Enter the name of the user who is the manager for this territory. This person would typically assign leads to salespeople.

> **IMPORTANT**
>
> You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.

- **Description**. Enter any details that you'd like to include for this territory, for example, "Sales territory created for education and training."

6. When you're done, on the command bar, choose **Save** or **Save and Close**.
7. To assign members to a sales territory, open the territory, and then in the left pane, under **Common**, choose **Members**.
8. On the **Users** tab, in the **Records** group, choose **Add Members**.
9. In the **Look Up Records** dialog box, select a user, and then choose **Add**.

> **TIP**
>
> To make your salesperson's job easier, you can also set a default price list for a territory. More information: Create price lists and price list items to define pricing of products

**See also**

Administrator and sales manager guide
Nurture sales from lead to order (Sales)

# Change auto-numbering prefixes for contracts, cases, articles, quotes, orders, invoices, campaigns, categories, and knowledge articles

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Contracts, cases, articles, quotes, orders, invoices, marketing campaigns, categories, and knowledge articles (the new Knowledge Article entity introduced in Dynamics CRM Online 2016 Update and Microsoft Dynamics 365) are automatically numbered by Dynamics 365. If your organization has standard numbering formats, you can change the default three-character prefixes and number format to match your organization.

1. Go to **Settings** > **Administration** > **Auto-Numbering**.
2. In the **Set Auto-Numbering** dialog box, select the record type that you want to change.
3. In the **Prefix** box, enter up to three characters, symbols, or numbers.

   Prefixes are system-wide and are used for all system-generated numbers for the selected record type. If you change the prefix for a record type, it won't change the prefix of numbers that are already assigned.

   The prefix of the tracking token for email messages is set in the System Settings area. More information: System Settings dialog box - Email tab
4. In the **Number** box, enter the starting number.

   If you haven't set a numbering format before, the **Number** box displays 1000. After you set the numbering format and save your settings, this field is set to read-only and you can't modify it. If a custom auto-numbering solution was used, you won't be able to change the number.
5. Select a suffix length.

   Articles and knowledge articles don't have suffixes. The suffix is used for records that were created while you were offline and for which the number can't be guaranteed to be unique.
6. Click **OK** to save your settings.

**See also**

Use solutions for your customizations

# Define subjects to categorize cases, products, and articles

10/6/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 includes a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, products, and sales literature. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer. You can also provide the appropriate sales literature. You'll also be able to better understand gaps in your sales literature, evaluate service quality by subject area, and improve reporting on the performance of your products.

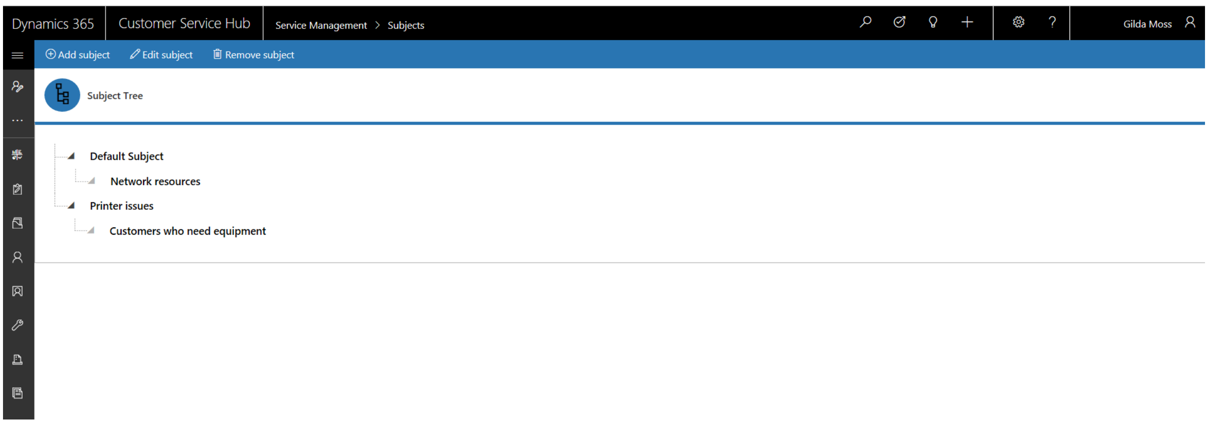
> **NOTE**
> With the Customer Engagement apps, version 9.1 release, subjects in service management are available in the Customer Service Hub based on the Unified Interface experience. We recommend that you manage subjects using the new experience.

## Create or edit a subject (Customer Service Hub)

1. In the Customer Service Hub app, go to **Service Management** and select **Case Settings** > **Subjects** in the sitemap to access subjects.

2. In the command bar:

   - Select **Add subject** to add a subject. A quick create dialog box is displayed. Enter **Name** and **Description** for the subject.
     - You can choose default subject as parent in the **Parent Subject** drop-down. If you don't choose a parent subject, then your subject begins from the same node as default subject.
   - Select a subject from the tree and select **Edit subject** to edit a subject
   - Select a subject from the tree and select **Remove subject** to delete a subject




## Create or edit a subject (Customer Service app)

1. Go to **Settings** > **Business Management**. select **Subjects**. You can also get there by going to **Settings** > **Service Management** > **Subjects**.

2. To add a subject, under **Common Tasks**, select **Add a Subject**.

-OR-

To edit a subject, in the **Subject Tree**, select a subject, and then under **Common Tasks** select **Edit Selected Subject**.

3. In the **Subject** dialog box, enter the required information:

   - **Title**: Type a name for the subject. This is a required field.

   - **Parent Subject**: To search for and select a parent subject for the new subject, select the **Lookup** button.

     -OR-

     To make the new subject a parent subject, leave the **Parent Subject** box empty.

   - **Description**: Type a descriptive statement about the subject.

4. Select **OK**.

**See also**

Service Manager Guide (Customer Service Hub and Customer Service app)

# Create or edit business units to improve security and control

10/10/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

In Dynamics 365, a business unit is a logical grouping of related business activities.

If your Dynamics 365 organization is structured around departments or divisions that have separate products, customers, and marketing lists, you might want to create business units. Business units are mapped to an organization's departments or divisions. Users can securely access data in their own business unit, but they can't access data in other business units.

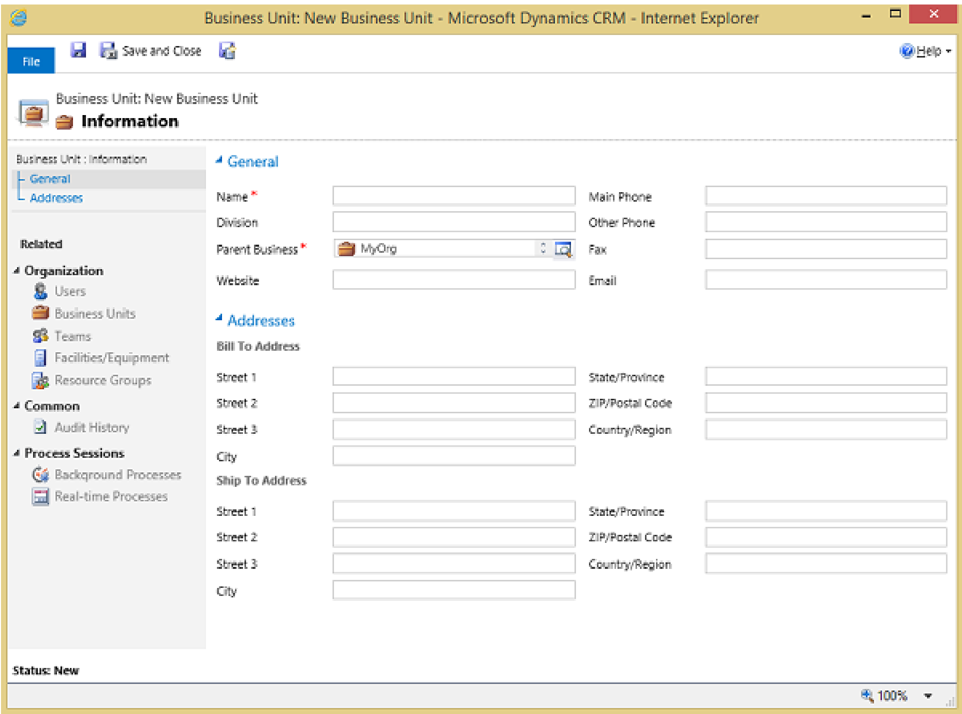
Business units, security roles, and users are linked together in a way that conforms to the Dynamics 365 role-based security model. Use business units together with security roles to control data access so people see just the information they need to do their jobs. More information: Security concepts for Microsoft Dynamics 365

Keep the following in mind when creating business units:

- The organization (also known as the root business unit) is the top level of a Dynamics 365 business unit hierarchy. Dynamics 365 automatically creates the organization when you install or provision Dynamics 365. You can't change or delete the organization name.
- Each business unit can have just one parent business unit.
- Each business unit can have multiple child business units.
- Dynamics 365 security roles and users are associated with a business unit. You must assign every user to one (and only one) business unit.
- You can assign a team to just one business unit, but a team can consist of users from one or many business units. Consider using a team if you have a situation where users from different business units need to work together on a shared set of records.

## Create a new business unit

1. Go to **Settings** > **Security**.
2. Choose **Business Units**.
3. On the Actions bar, select **New**.
4. In the **Business Unit** dialog box, type a name for the new business unit. Dynamics 365 automatically fills in the **Parent Business** field with the name of the root business unit.




5. If you want to change the parent business unit, select the **Lookup** button , **Look Up More Records**, and then do one of the following:

   - Select an existing business unit from the list.

   - Create a new parent business unit:

     a. Choose **New**, and then add the information for the new parent business unit in the **Business Unit** dialog box.

     b. When you're done adding information, select **Save and Close**.

     c. In the **Look Up Record** dialog box, select **Add**.

6. In the **Business Unit** dialog box, fill in any of the other optional fields, such as the Division, Website, contact information, or addresses.

7. When you're done making entries, select **Save and Close**.

## Change the settings for a business unit

1. Go to **Settings** > **Security**.

2. Choose **Business Units** and then select a business unit name.

3. In the **Business Unit** dialog box, do one or more of the following:

   - Modify the data in one or more fields.

   - Select a record type under **Organization** to see a list of related records. For example, select **Users** to view a list of users in the selected business unit.

4. When you're done making changes select **Save and Close**.

## Change the business unit for a record

You can change the business unit for an individual facility, equipment, or user.

**Change the business unit for facilities or equipment**

1. Go to **Settings** > **Business Management**.

2. Choose **Facilities/Equipment**.

3. Select the **Name** of a piece of equipment or a facility.

4. In the **Facility/Equipment** dialog box, on the **Actions** menu, choose **Change Business Unit**.

5. In the **Change Business Unit** dialog box, use the **Lookup** button  to select a new business unit, and then select **OK**.

6. Select **Save and Close**.

#### Change the business unit for a user

> **IMPORTANT**
>
> By changing the business unit for a user, you remove all security role assignments for the user. At least one security role must be assigned to the user in the new business unit. More information: Security roles.

1. Go to **Settings** > **Security**.

2. Choose **Users**.

3. Select a user name.

4. On the **More Commands** (**...**) menu, select **Change Business Unit**.

5. In the **Change Business Unit** dialog box, use the **Lookup** button  to select a new business unit, and then select **OK**.

### See also

Set up a Dynamics 365 organization
Delete a business unit
Assign a business unit a different parent business

# Delete a business unit

10/4/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can delete a business unit to completely remove it from Dynamics 365.

> **IMPORTANT**
> Before deleting a business unit, be sure to consider the following:
>
> - Deleting a business unit is irreversible.
> - The records owned by the business unit (for example: Teams, Facilities/Equipment, and Resource Groups) are deleted at the same time you delete the business unit.
> - You can't delete a business unit until you delete any associated users, teams, and child business units.

1. Go to **Settings** > **Security**.
2. Choose **Business Units**.
3. Click to select the business unit that you want to delete.
4. On the Actions toolbar, choose **More Actions** > **Disable**.

> **IMPORTANT**
> When you disable a business unit, all users and teams associated with the business unit will not be able to sign in. You will need to reparent users and teams to another business unit and reassign security roles.

5. In the **Confirm Deactivation** dialog box, choose **Deactivate**.
6. With the entry for the business unit you're deleting still selected, on the Actions toolbar, choose the **Delete** icon ✕.
7. In the **Confirm Deletion** dialog box, choose **Delete**.

**See also**

Assign a business unit a different parent business

# Assign a business unit a different parent business

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can assign a different parent business to a business unit to accommodate changes in your business requirements. When you reassign a business unit, any child business units are also reassigned with it.

1. Go to **Settings** > **Security**.
2. Choose **Business Units**.
3. Choose to select the business unit you want to change the settings for.
4. On the Actions toolbar, choose **More Actions** > **Change Parent Business**.
5. In the **Change Parent Business** dialog box, in the New parent business text box, type part or all of the name of the parent business you want to assign the business unit to, and then choose the **Click to select a value for New parent business** icon .
6. Select the record for the parent business you want to assign the business unit to, and then click **OK**.

**See also**

Control Data Access
Create or edit a site

# Create or edit a site to specify location

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can create a new site to add an office location or other facility where service operations take place. You can also edit the details, such as the street address or phone number, for an existing site.

1. Go to **Settings** > **Business Management**.
2. Choose **Sites**.
3. To create a new site, on the Actions toolbar, choose **New**.

   - OR -

   To edit an existing site, in the list of sites, under Name, double-click or tap the entry for the site you want to edit details for.
4. Under **General**, in the **Name** text box, specify or edit the name for the site.

   You can also enter or update contact information for the site.
5. Under **Primary Address**, enter or update address details.
6. In the **Time Zone** box, ensure that the default time zone is appropriate for the site.
7. Choose **Save and Close**.

### See also

Create or edit business units
Add resources to a site

# Add resources to a site

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

After you create a site, you can add resources such as users, equipment, or facilities to it.

1. Go to **Settings** > **Business Management**.
2. Choose **Sites**.
3. In the list of sites, under **Name**, double-click or tap the site that you want to add resources to.
4. In the Navigation Pane, expand **Common** if necessary, and then click or tap **Resources**.
5. On the Actions toolbar, click or tap **Add Resources**.
6. In the **Look Up Records** dialog box, in the **Search** text box, type in a part of the name of the resource you want to add to the site, and then click or tap the **Start search** icon .
7. In the list of records, under **Full Name**, click or tap the entry for the resource you want to add to the site, and then click or tap **Add**.
8. Close the site record.

**See also**

Set up a Dynamics 365 organization
Change regional and language options for your organization

# Enhanced service level agreements

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Service level agreements (SLAs) are a formalized method to help organizations meet service levels when they provide customer service and support. For example, an organization can have an SLA to complete the first customer response within 48 business hours after a case is created. Another example is to escalate an unresolved case after a specified duration, such as five business days. SLAs are used to define these different aspects of service.

Dynamics 365 includes two kinds of SLAs, standard and enhanced. Enhanced SLAs include the following features not available in standard SLAs:

- Case-on-hold support
- Auto-pause and resume of time calculation
- Support for success actions
- Creation of dashboards or reports based on the SLA KPI Instance entity

## Case-on-hold support

One feature of SLA tracking is the ability to control the case-on-hold status. For example, this functionality lets you pause a case for a time when the case is on hold waiting for a response from the customer. Once the response is received, the case is resumed.

System administrators turn on SLAs and select case hold functionality in **Settings** > **Service Management** > **Service Configuration Settings**. Afterwards, CSR Managers can create SLAs using the enhanced SLA type that allows pause and resume functionality. SLAs are created in **Settings** > **Service Management**.

More information: Define service level agreements (SLAs)

## Considerations when you choose a SLA type

Because there are two types of SLAs that have different functionality, consider the following features before you choose an SLA type. We recommend that you use only one type of SLA for an organization.

- After you select an SLA type, either standard or enhanced, you cannot change the SLA type for any record associated with the SLA.
- Because standard and enhanced SLAs exist as separate entities with separate forms, views, and fields, the following behaviors exist.
  - Case views cannot be sorted by enhanced SLA fields. To display enhanced SLA fields in Case views, you can modify any of the Case views to display the fields from the enhanced SLA (which has the entity name SLA KPI Instance). Although you can sort on the fields that are part of the Case entity, because the enhanced SLA fields are on a related entity, you cannot sort on columns that are associated with the enhanced SLA fields.
  - Queue Item views do not display enhanced SLA fields. Although, Queue Item views display the standard fields SLA (First Response By and Resolve By), because the enhanced SLA (SLA KPI

Instance entity) is not directly related to the Queue Item entity, the columns associated with enhanced SLAs cannot be displayed.

> **TIP**
>
> To monitor enhanced SLA details, consider creating custom dashboards based on the SLA KPI Instance entity or custom views using the Regarding (Case) relationship.

### See also

Video: SLA Enhancements in Microsoft Dynamics CRM 2015

Enable languages

# Configure Relevance Search to improve search results and performance

8/24/2018 • 16 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Relevance Search delivers fast and comprehensive search results in a single list, sorted by relevance. It uses a dedicated search service external to Dynamics 365 (online) powered by Azure Search to improve your Dynamics 365 (online) search experience. As an administrator or customizer, you'll be able to enable and configure Relevance Search in the Dynamics 365 user interface without writing code. Many of the configuration steps will look familiar to you, as they use the same user interface as the Quick Find configuration.

Relevance Search is available in addition to other Dynamics 365 search experience you're already familiar with. You can still use single-entity Quick Find on the entity grid. You can also use multi-entity Quick Find (now called Categorized Search) from the **Search Dynamics 365 data** search box on the navigation bar.

Relevance Search brings the following enhancements and benefits:

- Improves performance with external indexing and Azure Search technology.
- Finds matches to any word in the search term in any field in the entity. Matches may include inflectional words, like "stream," "streaming," or "streamed."
- Returns results from all searchable entities in a single list sorted by relevance, based on factors, such as number of words matched or their proximity to each other in the text.
- Matches in the result list are highlighted.
- Includes the ability to search documents found in Notes and Attachments on Emails and Appointments tracked in Dynamics 365.

## Compare Dynamics 365 searches

There are three kinds of search in Dynamics 365:

- Relevance Search
- Full-text Quick Find (single-entity or multi-entity)
- Quick Find (single-entity or multi-entity)

The following table provides a brief comparison of the three available searches.

| FUNCTIONALITY | RELEVANCE SEARCH | FULL-TEXT QUICK FIND | QUICK FIND |
|---|---|---|---|
| Availability | Available for Dynamics 365 (online) organizations that have installed Dynamics 365 (online), version 9.0. Not available for Dynamics 365 (on-premises) organizations. | Available for Dynamics 365 (on-premises) organizations, starting with Dynamics CRM 2015 Update Rollup 1. | Available for Dynamics 365 (online) organizations and Dynamics 365 (on-premises) organizations. |

| FUNCTIONALITY | RELEVANCE SEARCH | FULL-TEXT QUICK FIND | QUICK FIND |
|---|---|---|---|
| Enabled by default? | No. An administrator must manually enable it. | No. An administrator must manually enable it. | Yes |
| Single-entity search scope | Not available in an entity grid. You can filter the search results by an entity on the results page. | Available in an entity grid. | Available in an entity grid. |
| Multi-entity search scope | There is no maximum limit on the number of entities you can search. **Note:** While there is no maximum limit on the number of entities you can search, the Record Type filter shows data for only 10 entities. | Searches up to 10 entities, grouped by an entity. | Searches up to 10 entities, grouped by an entity. |
| Search behavior | Finds matches to any word in the search term in any field in the entity. | Finds matches to all words in the search term in one field in an entity; however, the words can be matched in any order in the field. | Finds matches as in a SQL query with "Like" clauses. You have to use the wildcard characters in the search term to search within a string. All matches must be an exact match to the search term. |
| Search results | Returns the search results in order of their relevance, in a single list. | For single-entity, returns the search results in an entity grid. For multi-entity, returns the search results grouped by categories, such as accounts, contacts, or leads. | For single-entity, returns the search results in an entity grid. For multi-entity, returns the search results grouped by categories, such as accounts, contacts, or leads. |

# How Relevance Search works

Relevance Search uses the same default scoring concepts as Azure Search. Scoring refers to the computation of a search score for every item returned in search results. The score is an indicator of an item's relevance in the context of the current search operation. The higher the score, the more relevant the item. In search results, items are ranked in order from high to low, based on the search scores calculated for each item. By default, a search score is computed based on statistical properties of the data and the query. Relevance Search finds documents that include the search terms in the query string, favoring the documents that contain many instances of the words in the search term and their close proximity to each other in the document. The search score goes up even higher if the term is rare across the index, but common within the document. The results are then ranked by search score before they're returned. Search score values can be repeated throughout a result set. For example, you might have 10 items with a score of 1.2, 20 items with a score of 1.0, and 20 items with a score of 0.5. When multiple hits have the same search score, the ordering of same-score items isn't defined, and isn't stable. Run the query again and you might see items shift position. Given two items with an identical score, there is no guarantee which one appears first. More information: Add scoring profiles to a search index (Azure Search Service REST API)

Searchable fields are analyzed in the Azure Search index to provide a more natural, end-user friendly search experience by breaking words into their root forms, text normalization, and filtering out noise words. All searchable fields in Relevance Search are analyzed with the Microsoft Natural language analyzer, which uses Lemmetization to break words down into their root linguistic forms. For example, "ran" will match to "run" and "running" since "run" is considered the base form of the word. Word stemmers, such as SQL full-text indexes, don't have any linguistic context and only consider matches where the root is the same as the inflectional form.

With stemming, “run” would match to “running” and “runner”, but not “ran” since it doesn’t consider “ran” to be a word linguistically related to “run”. All searchable fields in Relevance Search use an analyzer that most closely matches the organization’s base language. For Kazakh, which is the only language supported by Dynamics 365 but not by Azure Search, all fields are analyzed using the default analyzer. For more information about language analysis and a list of the supported languages, see: Language support (Azure Search Service REST API).

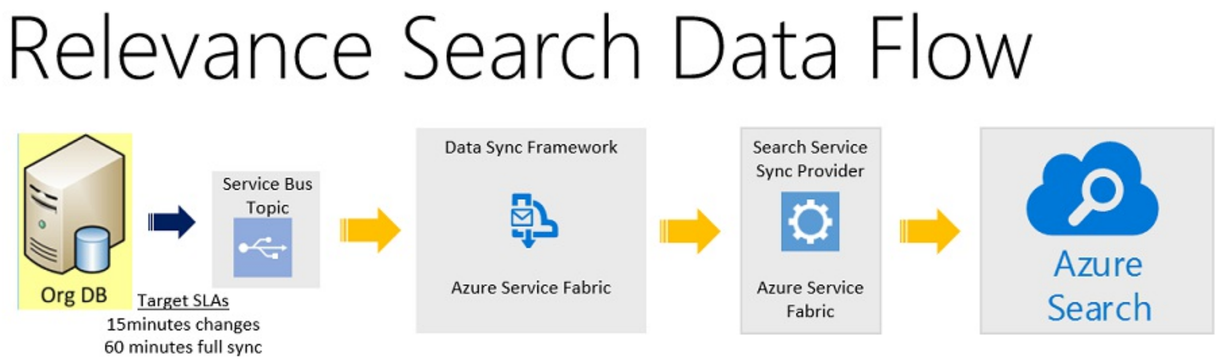
**Search results**

You'll see hit highlights when your search term matches a term in your application. These appear as bolded and italicized text in the search results. Notice these search terms are often returned as only a portion of the full value in a field since only the matched terms are highlighted. For example, using the search term *L. Wendell* returns the record for the contact with first name *L. Wendell* and last name *Overby*, as **Wendell Overby** in the search results.

## Relevance Search architecture

Relevance Search is hosted on the Azure cloud computing platform and infrastructure that uses Azure Search, which provides the search results. Changes made in Dynamics 365 may take up to 15 minutes to appear in the search service. It may take up to up to an hour or more to complete a full sync for average to large size organizations.

The following diagram shows the high level Relevance Search architecture.



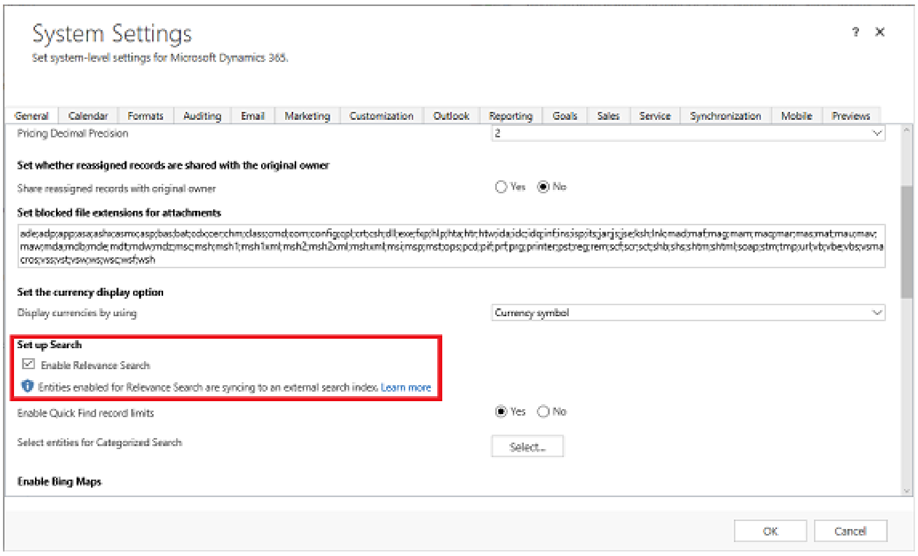

## Enable Relevance Search

> **IMPORTANT**
> Data in your application begins syncing to the external search index immediately after you enable Relevance Search. We strongly recommend that you configure the entities and entity fields participating in Relevance Search before you enable the search, to prevent sensitive data from being indexed in a service external to Dynamics 365 (online). For more information about configuring Relevance Search, see Select entities for Relevance Search, Configure searchable fields for Relevance Search, and Set managed property for Relevance Search.

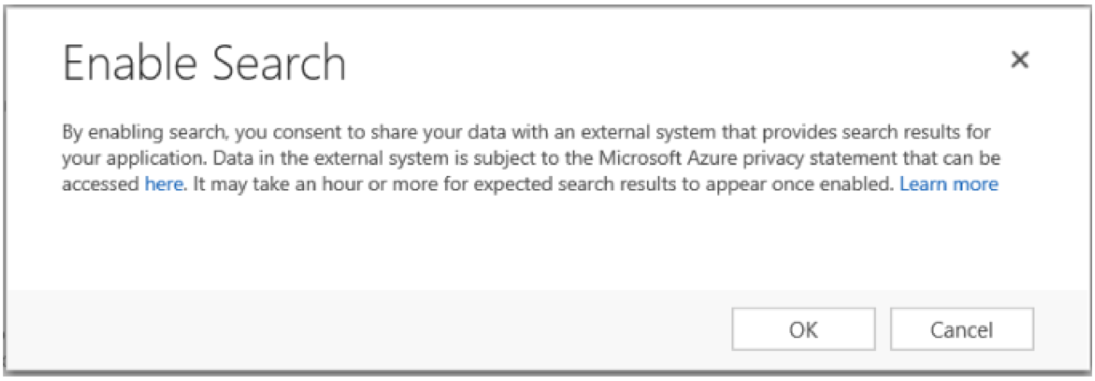
Because you’ll be sharing your Dynamics 365 data with the external system, Relevance Search is disabled by default. To enable it, you must accept the consent terms. Depending on the size of your organization, it may take up to an hour or more for the data to become available in the external search index after you enable the search. Enabling Relevance Search makes this search option available to all members of your organization.

By default, Relevance Search is disabled. To enable Relevance Search, do the following:

1. Go to **Settings** > **Administration**.
2. Click **System Settings** > **General** tab.
3. In the **Set up Search** sub-area, select the **Enable Relevance Search** check box, as shown here.



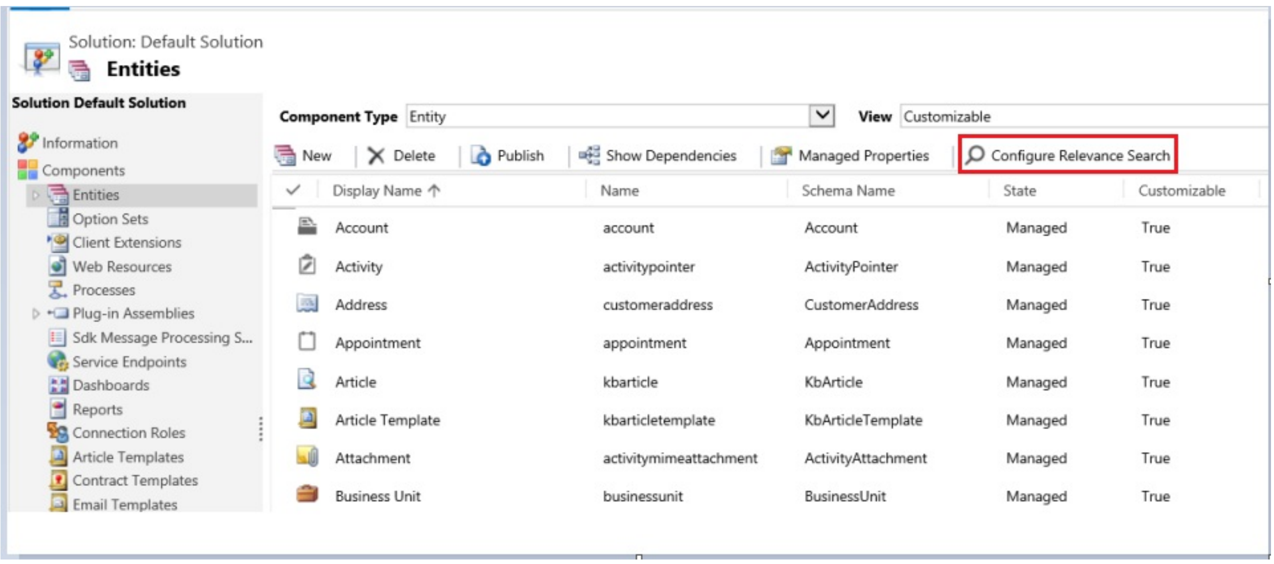

4. After you enable Relevance Search, the **Enable Search** consent dialog box opens. Click **OK** to give your consent.




5. Click **OK** to close the **System Settings** dialog.

# Select entities for Relevance Search

To configure Relevance Search, use the **Configure Relevance Search** selection on the task bar, as shown here.




There is no limit on how many entities you can include in the Relevance Search results. However, there is a limit on the total number of fields in the external search index. Currently, the maximum is 1000 searchable fields for an organization. When you select an entity to include in the search results, you'll notice a number in parentheses next to the entity name. The number indicates how many fields each entity uses in the external search index. Some fields, such as **Primary Name** and **ID**, are shared by multiple entities and don't count toward the total.

Additionally, some field types use more than one field in the external search index as indicated in this table.

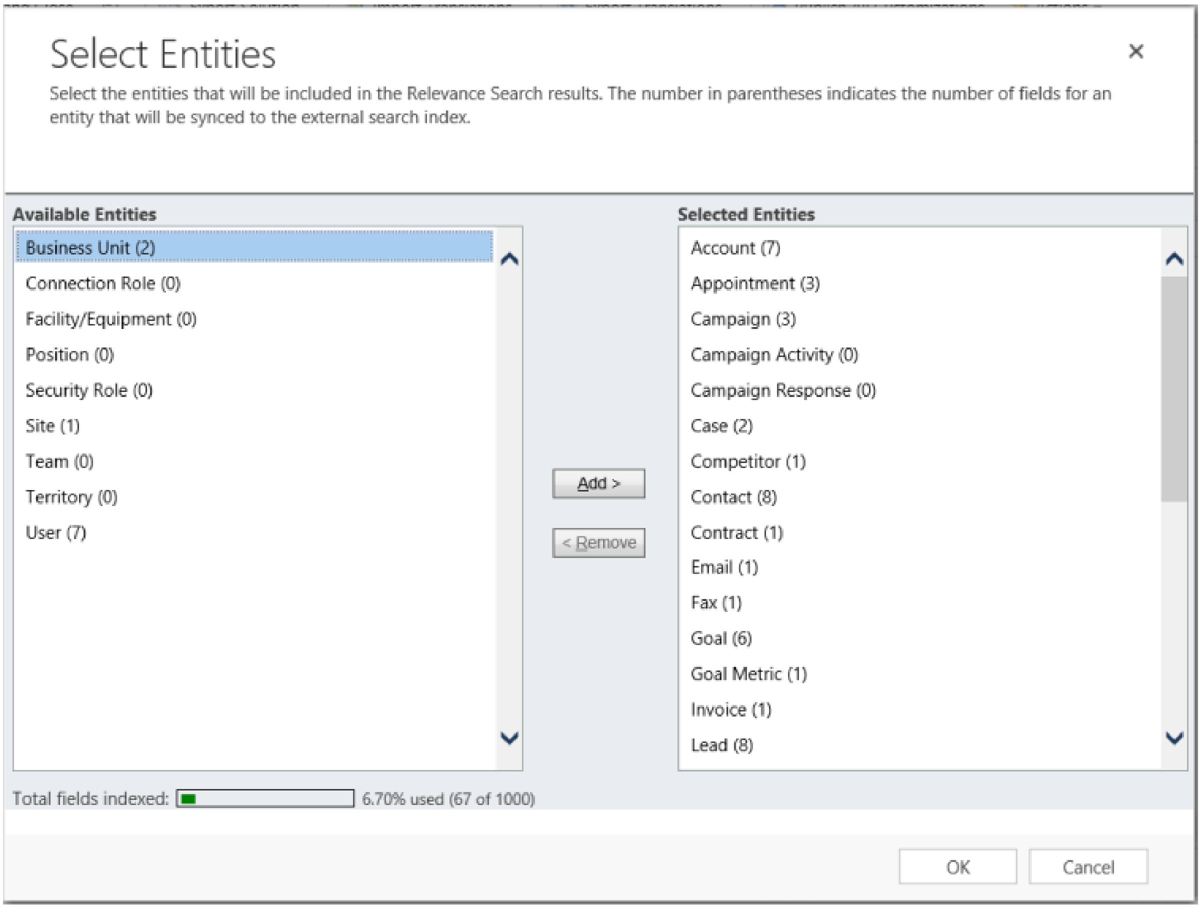
| FIELD TYPE | NUMBER OF FIELDS USED IN THE EXTERNAL SEARCH INDEX |
| --- | --- |
| Lookup (customer, owner, or Lookup type attribute) | 3 |
| Option Set (state, or status type attribute) | 2 |
| All other types of fields | 1 |

The progress bar **Total fields indexed** shows the percentage of indexed fields to the maximum allowed number of searchable fields.

When you have reached the indexed field limit, you'll see a warning message. If you want to add more fields to the index, you'll have to free up space, either by removing some of the fields that are already in the index or removing entire entities from Relevance Search.

To select entities for the Relevance Search results, do the following:

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, and then click **Configure Relevance Search**.
4. The **Select Entities** dialog box opens. Click **Add** to select the entities for the search results. When you're done, click **OK**.




5. Click **Publish All Customizations** for your changes to take effect.

By default, some out-of-the-box system entities are included in Relevance Search. However, custom entities aren't included. You have to add them to Relevance Search.

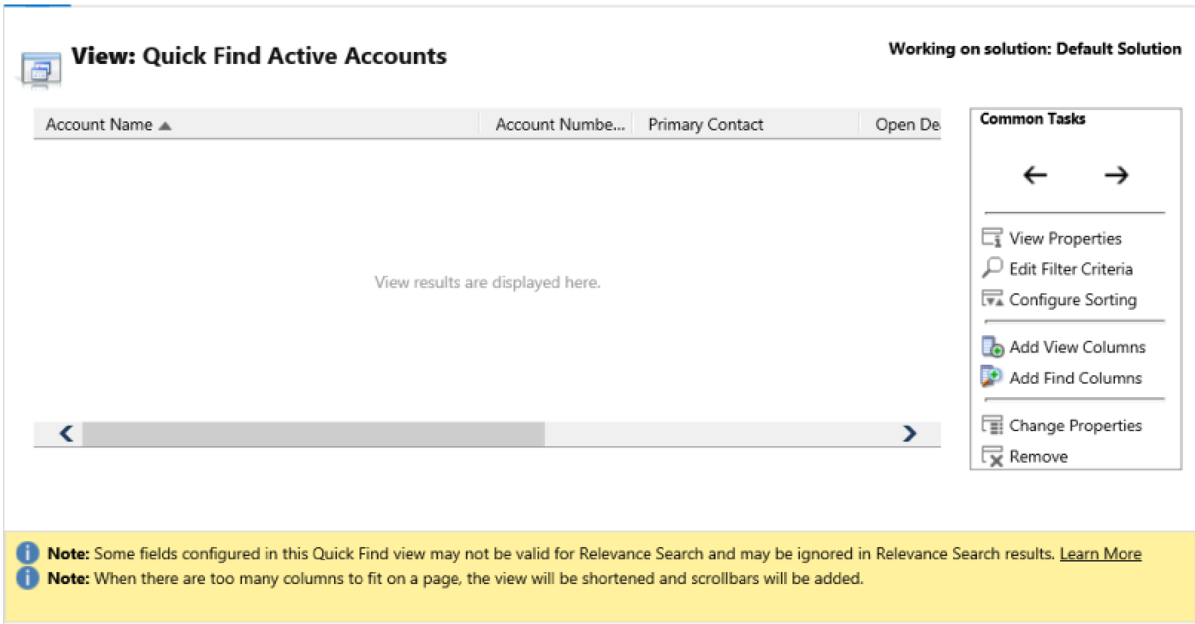
# Configure searchable fields for Relevance Search

The fields you add in the Quick Find view become part of the external search index. There is no limit on how many searchable fields you can add for each entity. However, there is a limit on the total number of indexed fields, as was explained in the previous section. **Find Columns** on a **Quick Find View** define the searchable fields in the external search index. Text fields such as Single Line of Text and Multiple Lines of Text, Lookups, and Option Sets are searchable. **Find Columns** with other data types are ignored. The **View Columns** on a **Quick Find View** define the fields that are displayed in the user interface by default, when the matched results are returned. The fields that are highlighted replace the fields that don't have the highlighting. The first four matched fields are displayed in the results. The **filter** on a Quick Find view is also applied to the Relevance Search results. See the table below for the list of filter clauses not supported by Relevance Search.

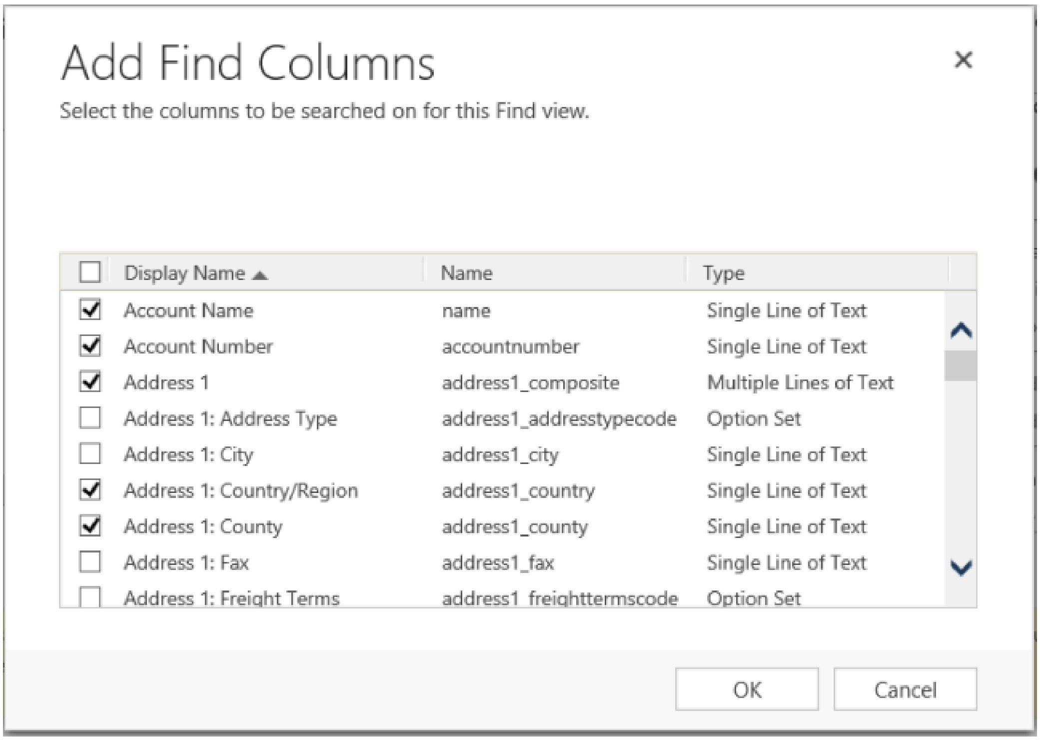
> **NOTE**
>
> There are some fields, called common fields, common to every CRM entity that are defined on the index by default. They are:
>
> 1. ownerid (Name of lookup)
> 2. owningbusinessunit (Name of lookup)
> 3. statecode (Label of optionset)
> 4. statuscode (Label of optionset)
> 5. name (Primary name field of any entity. This may or may not be the same as the logical name (fullname, subject etc.) of the entity) If a common field is added to any entity for Relevance Search, search will be performed for that common field across all entities. However, once you choose a specific entity through the Record Type facet, Relevance Search will follow the settings you have defined for that specific entity through Quick Find View.

You can use the **Quick Find** view to define which fields appear as facets when users search by using Relevance Search. All **View Columns** with data types other than Single Line of Text and Multiple Lines of Text are marked as facetable and filterable in the index. By default, the first four facetable fields in the **Quick Find** view for the selected entity are displayed as facets when users search by using Relevance Search. At any time, you can only have four fields selected as facets.

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. In the navigation tree, click **View**. Double-click **Quick Find View**. The following illustration shows the **Quick Find** view for the `Account` entity.




5. Click **Add Find Columns**. In the dialog box, select the fields you want to add to the search index. When done, click **OK**. In the following illustration, you see the `Account` entity fields added to the external search index.




6. Repeat the steps for the **View Columns**.

7. Click **Publish All Customizations** for your changes to take effect.

> **NOTE**
>
> The changes you make in **Quick Find** view also apply to single-entity and multi-entity (Categorized Search) Quick Find configurations. This is why we don't prevent you from including the fields that aren't supported for Relevance Search when you configure **Quick Find** view. However, unsupported fields aren't synced to the external index and don't appear in the Relevance Search results.

For Relevance Search, fields on a related entity are not supported as Find, View, or Filter fields.

The following table contains the **Quick Find Filter** operators that aren't supported for Relevance Search:

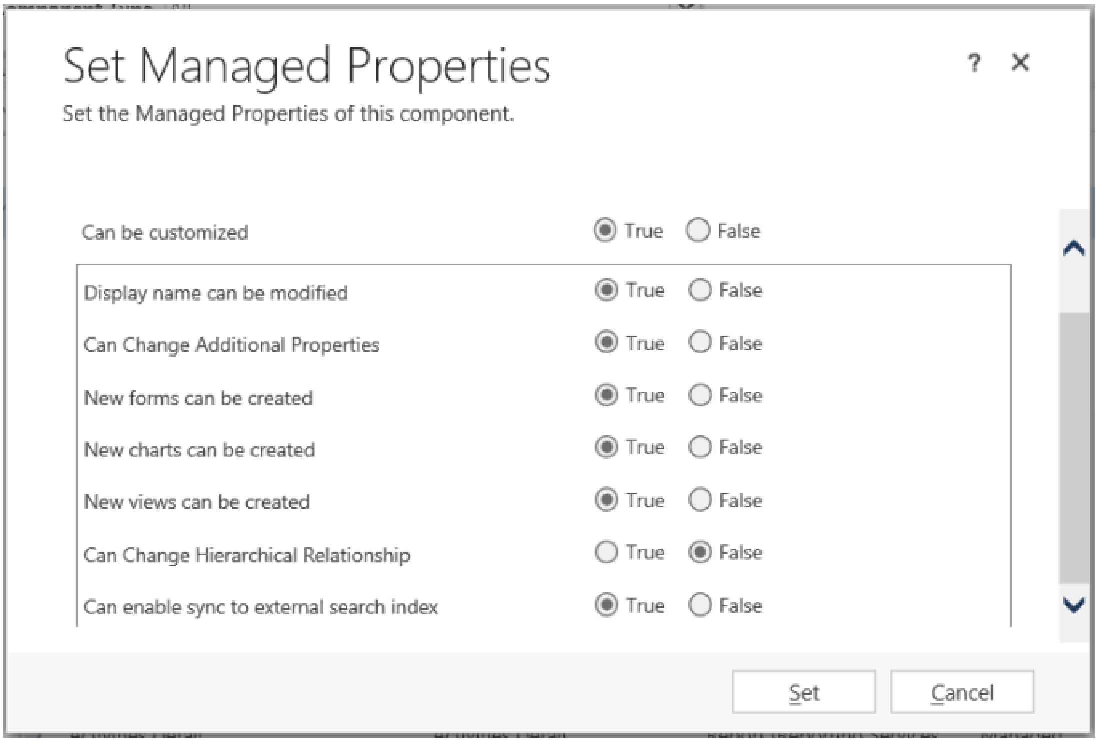
| DYNAMICS 365 OPERATOR |
| --- |
| **Like** |
| **NotLike** |
| **BeginsWith** |
| **DoesNotBeginWith** |
| **EndWith** |
| **DoesNotEndWith** |
| **ChildOf** |
| **Mask** |
| **NotMask** |
| **MaskSelect** |
| **EqualUserLanguage** |
| **Under** |
| **NotUnder** |
| **UnderOrEqual** |
| **Above** |
| **AboveOrEqual** |
| **NotNull** |
| **Null** |

## Set managed property for Relevance Search

If you want to include an entity in Relevance Search, the **Can enable sync to external search index** managed property for this entity must be set to **True**. By default, the property is set to **True** for some of the out-of-the-box system entities and all custom entities. Some of the system entities can't be enabled for Relevance Search.

To set the managed property, do the following:

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, and then click the entity you want.
4. On the menu bar, click **Managed Properties**. For **Can enable sync to external search index**, click **True** or **False** to set the property to the desired state. Click **Set** to exit, as shown here.




5. Click **Publish** for your changes to take effect.

   If you want to change the **Can enable sync to external search index** property to **False**, you must first deselect the entity from Relevance search. If the entity is included in Relevance Search, you'll see the following message: "This entity is currently syncing to an external search index. You must remove the entity from the external search index before you can set the **Can Enable Sync to External Search Index** property to **False**." If **Can Enable Sync to External Search Index** is set to **False**, you'll see the following message when you try to include an entity in Relevance Search: "Entity can't be enabled for Relevance Search because of the configuration of its managed properties." For custom entities with particularly sensitive data, you may consider setting the **Can enable sync to external search index** property to **False**. Keep in mind, after you install the managed solution on the target system, you won't be able to change the value of the property because it's a managed property.

## Privacy notice

By enabling Relevance Search, data in participating entities and attributes in your Dynamics 365 (online) instance will begin syncing to and be stored in an Azure Search index.

Relevance Search is not enabled by default. The system administrator must enable the functionality within a Dynamics 365 (online) instance. After Relevance Search is enabled, system administrators and customizers have full control over the data that will be synchronized to the Azure Search index.

System customizers can use the **Configure Relevance Search** dialog box in **Customization Tools** to enable specific entities for search and then configure Quick Find views on enabled entities to select the searchable attributes. Data changes are synchronized continuously between Dynamics 365 (online) and Azure Search through a secure connection. Configuration data is encrypted and the required secrets are stored in Azure Key Vault.

Azure components and services that are involved with Relevance Search functionality are detailed in the following sections.

Microsoft Azure Trust Center

Azure Search Services

An Azure Search index is used to provide high-quality search results with quick response times. Azure Search adds powerful and sophisticated next-generation search capabilities to Dynamics 365 (online). This is a dedicated search service external to Dynamics 365 (online) provided by Azure. All new Azure Search indexes are encrypted at rest. If you opted in before January 24, 2018, you'll need to reindex your data by opting out of Relevance Search, waiting an hour, and opting back in.

### Azure SQL Database

Relevance Search uses the Azure SQL Database to store:

- Configuration data related to the organization and the corresponding index
- Metadata relating to the search service and indexes
- Pointers to system metadata and data when synchronizing changes
- Authorization data to enable enhanced row- level security

### Azure Event Hubs

The Azure Event Hubs component is used for message exchange between Dynamics 365 (online) and Azure and to maintain work items that are managed by the synchronization process. Each message stores information, such as the organization ID and entity name, used to sync the data.

### Azure Service Fabric Cluster

The processing and indexing of data is handled in micro-services deployed on virtual machines managed through the Service Fabric runtime. The search APIs and the data synchronization process are also hosted on the Service Fabric cluster.

Service Fabric was born from years of experience at Microsoft delivering mission-critical cloud services and is now production-proven for over five years. It's the foundational technology on which we run our Azure core infrastructure, powering services including Skype for Business, Intune, Azure Event Hubs, Azure Data Factory, Azure DocumentDB, Azure SQL Database, and Cortana—which can scale to process more than 500 million evaluations per second.

### Azure Virtual Machine Scale Sets

Azure Virtual Machine Scale Sets are elastic and designed to support hyper scale-out workloads. The Azure Service Fabric cluster runs on virtual machine scale sets. The micro-services for processing and indexing data are hosted on the scale sets and managed by the Service Fabric runtime.

### Azure Key Vault

Azure Key Vault is used for secure management of certificates, keys, and other secrets used in the search process.

### Azure Storage (Blob Storage)

Changes to customer data are stored for up to 2 days in Azure Blob Storage. These blobs are encrypted by leveraging the latest feature in the Azure Storage SDK, which provides symmetric and asymmetric encryption support and integration with Azure Key Vault. With the December 2016 update for Dynamics 365 (online), the documents found in Notes and Attachments on email messages and appointments are also synced to the blob storage.

### Azure Active Directory Service

Azure Active Directory is used to authenticate between the Dynamics 365 (online) and Azure services.

### Azure Load Balancer

The Azure Load Balancer is used to distribute incoming traffic among healthy service instances in cloud services or virtual machines defined in a load balancer set. Relevance Search uses it to load balance the end points in a deployment.

Azure Virtual Networks

The Virtual Machines on the Service Fabric cluster running in one or more subnets are connected by Azure Virtual Network. The security policies, DNS settings, route tables, and IP addresses are fully controlled within this virtual network. Network Security Groups are leveraged to apply security rules on this virtual network. These rules allow or deny network traffic to the VMs in the virtual network.

**See also**

Use Relevance Search for faster comprehensive results

# Manage product catalog configuration

9/27/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 offers a rich, easy to configure product catalog that will help your company sell products and services with greater efficiency. A sales operations manager will be able to create the product catalog with fewer SKUs, bundle product and service, as an attractive and cost effective offering, and define up-sell and cross-sell of products. In addition, the product catalog configuration data can be migrated across Dynamics 365 systems. For example, after the product catalog configuration is fully tested on the test server, you can move the configuration data to the production environment, without having to recreate it. To migrate, you'll be using the Configuration Migration Tool: Manage configuration data. As an administrator, you will be responsible for configuring and migrating the product catalog configuration data.

## Configure product catalog

To configure the product catalog:

1. Go to **Settings** > **Administration**.
2. Choose **System Settings**, then choose the **Sales** tab.

   In the **Sales** tab, set the appropriate values for the following settings and save the changes:

| SETTING | DESCRIPTION |
| --- | --- |
| **Create products in active state** | Select whether product records without a parent product family record are created in an `active` or `draft` state.<br><br>In the current release of Dynamics 365, by default, all the product records (product family, product, and bundle) are created in the `draft` state. This setting ensures compatibility for your applications working with the previous version of Dynamics 365 where the product records were created in an `active` state.<br><br>By default, its set to **No** in the new Dynamics 365 installations, and set to **Yes**, for the upgrading systems. |
| **Allow selection of default price list for opportunity via inbuilt rule** | Select whether the default price list for an opportunity is automatically selected based on the territory relationship for the price list and the current user who is creating the opportunity.<br><br>By default, it's set to **Yes**. |
| **Maximum number of products in a bundle** | Specify the maximum number of products that can be added in a bundle. |

| SETTING | DESCRIPTION |
| --- | --- |
| **Use system pricing calculation** | Select whether to use the Dynamics 365 system pricing engine to calculate prices in opportunities, quotes, orders, and invoices or to use custom pricing.<br><br>In Dynamics 365 (online), you can choose to use custom pricing logic instead of the system pricing to calculate prices when you add products in opportunities, quotes, orders, and invoices. To use custom pricing, select **No** for this option. Additionally, you must register a plug-in on the `CalculatePrice` message, provided in the Dynamics 365 Web services, that contains your custom pricing code. Every time you create or change the product information in an opportunity, quote, order, or invoice, the custom code is invoked instead of the Dynamics 365 system pricing engine to calculate the prices. For more information, see Use custom pricing for products. |
| **Discount calculation method** | Select whether you want to calculate discounts at the line-item level or at the per-unit level in each line item in an opportunity, quote, order, or invoice.<br><br>By default, it's set to **Line item**. |
| **Maximum number of properties that are allowed for a product or bundle** | Specify the maximum number of properties that can be associated with a product or bundle.<br><br>Product properties are added to a product family record, and all the child products and bundles under the product family inherit the properties added to the parent product family. The number specified in this setting comes into effect only when you publish a product or a bundle with the associated properties, and not at the time when you add the properties to a draft product family record. |

## Migrate product catalog configuration data

To migrate the product catalog configuration data, use the Configuration Migration Tool. For more information on how to use the tool, see: Manage configuration data.

You must select the following entities for migrating the product catalog configuration data:

- Product
- Product Association (needed for bundles)
- Product Relationship (not a mandatory entity, needed only for relationships)
- Property
- Property Association
- Property Option Set Item
- Notes (needed, if there are any notes for the product)
- Currency
- Price List
- Price List Item

- Unit
- Unit Group
- Territory (needed if there is a default price list configuration)
- Connection (needed, if there is a default price list configuration)
- Competitor (needed, if there are any competitors for product)
- Sales Literature and Sales Literature Item (needed, if there is any sales literature for product)
- Discount (not a mandatory entity, needed only for discounts when added to price lists)
- Discount List (not a mandatory entity, needed only for discounts)

> **NOTE**
> During product catalog configuration data transfer, you may see a schema validation warning, saying that the data transfer may be inconsistent. This is because you didn't include the Entitlement entity and the Entitlement Template entity in the transfer. However, these entities are not required and you can disregard the warning. The product catalog configuration data will be migrated correctly.

Certain conditions and restrictions apply during migration:

- Only active and retired products can be exported or imported.
- If importing of a product record fails because of a missing dependency, the related property records are not imported. When importing the product hierarchy, if creation of a record fails because of a missing dependency, the record's child hierarchy will not be imported.
- If for exporting, you selected the product entity, without selecting other entities required for export, the product records are exported without the associated properties.
- If for exporting, you select only the property entities (Property, Property Associations and Property Option Sets), without selecting the product entity, no data is exported.
- For a product record, any new property created in the source system, will also be created in the target system, after the import.
  For a product record, the source data will override any changes in the property that also exists in the target data, after the import.
  For a product record, if a property exists in both systems, source and target, when the property is removed from the source system, it is not removed from the target system, after the import.

**See also**

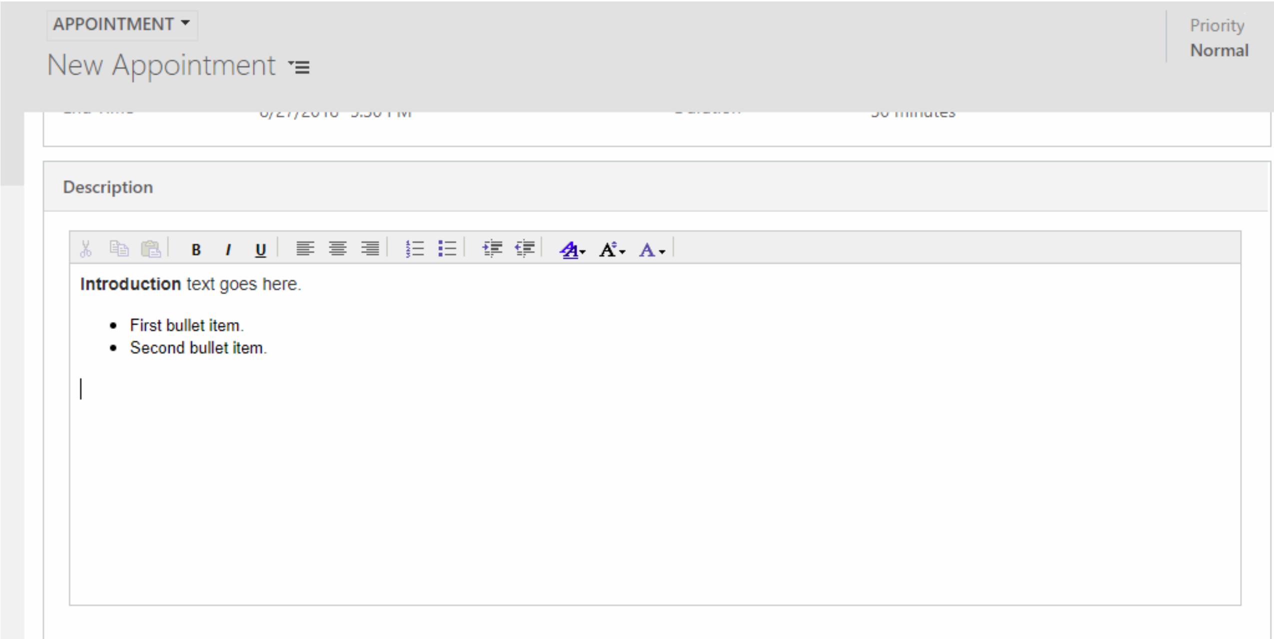
Manage configuration data
Video: Salesperson Experience with Product Taxonomy in Microsoft Dynamics CRM 2015
Product catalog entities

# Rich text experience for appointment activities

8/28/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

When you enable the rich text experience, server-side synchronization and appointment activities support rich text. With the rich text editor, appointment descriptions can contain rich text.




With rich text enabled you get the following benefits:

- Create and synchronize appointments with rich text content in the description for an improved experience in both web and the Unified Interface.
- Include content from an HTML web page right into the description field or create your own custom markup using the appointment editor. Appointments tracked from Outlook will also render rich text content in Dynamics 365 (online) for Customer Engagement.
- Server-side synchronization synchronizes the rich-text HMTL content of appointment descriptions into Dynamics 365 (online) for Customer Engagement.

**IMPORTANT**

To enable rich text, your Dynamics 365 for Customer Engagement version must be Dynamics 365 (online), version 9.0, or a later version.

After enabling, if you choose to disable the setting, the appointment editor description field will reset to the plain-text field. Previously synchronized appointments' description will still contain rich-text HTML markup.

Although the rich text editor can be used with appointment activities, it can't be used with recurring appointments. When an appointment that contains rich text is converted to a recurring appointment, the description field for the activity is converted to a plain-text field containing rich text content.

## Enable the rich text editor for appointments

To enable the rich text editor on appointments, you need to configure the AppointmentRichEditorExperience organization setting for your Dynamics 365 (online) for Customer Engagement instance by running the

PowerShell sample below.

The PowerShell cmdlets require the Dynamics 365 for Customer Engagement Microsoft.Xrm.Data.PowerShell module. The sample below includes the cmdlet to install the module.

```
#Install the module
Install-Module Microsoft.Xrm.Data.PowerShell -Scope CurrentUser

# Connect to the organization
Connect-CrmOnPremDiscovery -InteractiveMode #(or Connect-CrmOnlineDiscovery -InteractiveMode)

# Retrieve the organization entity
$entities = $organizationEntity = Get-CrmRecords -conn $conn -EntityLogicalName organization -Fields
appointmentricheditorexperience -TopCount 1
$organizationEntity = $entities.CrmRecords[0]

Write-Host "Appointment RTE existing value: " $organizationEntity.appointmentricheditorexperience

# Set the appointmentricheditorexperience field
$organizationEntity.appointmentricheditorexperience = $true #(or $false)

# Update the record
Set-CrmRecord -conn $conn -CrmRecord $organizationEntity
$entities = $organizationEntity = Get-CrmRecords -conn $conn -EntityLogicalName organization -Fields
appointmentricheditorexperience -TopCount 1
$organizationEntity = $entities.CrmRecords[0]

Write-Host "Appointment RTE updated value: " $organizationEntity.appointmentricheditorexperience
```

## See also

Create or edit an appointment

# Performance tuning and optimization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use this information to help you plan and optimize application performance with Dynamics 365.

# Verify network capacity and throughput for clients

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The primary characteristics of a network that affect the performance of Dynamics 365 clients, such as the web application or Dynamics 365 for Outlook, are *bandwidth* and *latency*.

- Bandwidth is the width or capacity of a specific communications channel.
- Latency is the time required for a signal to travel from one point on a network to another, and is a fixed cost between two points.

One of the main causes of poor performance of Dynamics 365 clients is the latency of the network over which the clients connect to the Dynamics 365 organization. Lower latencies (measured in milliseconds) generally provide better levels of performance.

Notice that, even if the latency of a network connection is low, bandwidth can become a performance degradation factor if there are many resources sharing the network connection, for example, to download large files or send and receive email.

Networks with high bandwidth don't guarantee low latency. For example, a network path traversing a satellite link often has high latency, even though throughput is very high. It's common for a network round trip traversing a satellite link to have five or more seconds of latency. An application designed to send a request, wait for a reply, send another request, wait for another reply, and so on, will wait at least five seconds for each packet exchange, regardless of the speed of the server.

## How to check latency

Dynamics 365 includes a basic diagnostic tool that analyzes the client-to-organization connectivity and produces a report. To run the Dynamics 365 Diagnostics tool, follow these steps.

1. On the user's computer or device, start a web browser, and sign in to a Dynamics 365 organization.
2. Enter the following URL, *https://myorg.crm.dynamics.com/tools/diagnostics/diag.aspx*, where *myorg.crm.dynamics.com* is the URL of your Dynamics 365 (online) organization.
3. Click **Run**.

The report displays a table with test and benchmark information. Of particular importance is the **Latency Test** row value. This value is an average of twenty individual test runs. Generally, the lower the number, the better the performance of the client. Although users may receive a satisfactory experience by using connections with more latency, for best application performance we recommend that the value be 150 ms (milliseconds) or less.

## Best practices for improving application performance

- Maximize how quickly your forms load. More information: Optimize form performance
- Make sure you aren't using legacy form rendering, which can make forms take significantly longer to load. More information: System Settings dialog box - General tab

**See also**

Performance tuning and optimization

# Key preparation and configuration tasks

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This topic, which is intended for administrators and business users of Dynamics 365, describes common configuration settings and tasks that can help you keep your organization optimized so that you can focus on what's important. It's designed to improve your overall experience with Dynamics 365, even before your business begins to use it.

## Common configuration settings for Internet Explorer

Dynamics 365 is a web-based application and uses web browsers, such as Internet Explorer, as the user interface to view, add, or edit information that you've stored in the Dynamics 365 database. Make the following common Internet Explorer configuration settings to optimize your Dynamics 365 experience.

**Increase disk space for temporary Internet files**

To make sure that Internet files for Dynamics 365 are not being deleted, increase the disk space for temporary Internet files.

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

**Retain browsing history**

To optimize your Dynamics 365 experience, we recommend that you do not select the option to delete the browsing history when you exit from your browser. If you select this option, it deletes everything marked in your **Browsing history** settings, such as temporary Internet files, cookies, and history (by default, the check boxes for these options are selected). Deleting your temporary Internet files causes Internet Explorer to cache the files again, and deleting cookies signs you out of Dynamics 365.

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

   Dynamics 365 occasionally uses pop-up windows. Your browser may be blocking these windows because of the pop-up blocker settings. You must configure the pop-up blocker settings to allow pop-up windows for the Dynamics 365 websites.

   Dynamics 365 occasionally uses pop-up windows. Your browser may be blocking these windows because of the pop-up blocker settings. You must configure the pop-up blocker settings to allow pop-up windows for the Dynamics 365 websites.

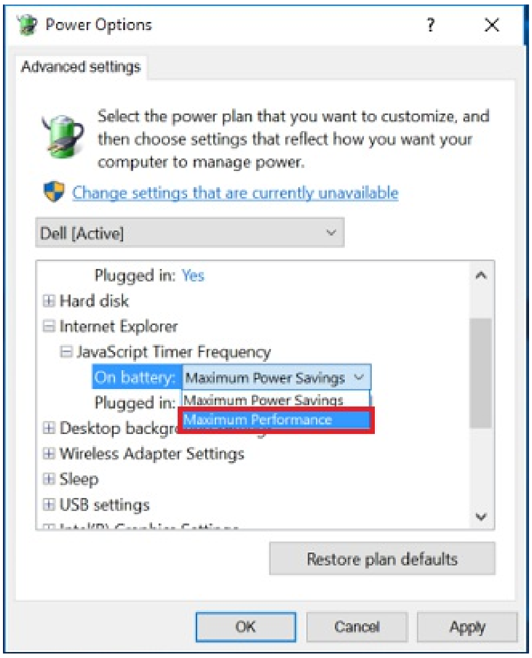
   **If you experience slower performance in Internet Explorer**

If your Dynamics 365 performance is slower in Internet Explorer than in other browsers, set **JavaScript Timer Frequency** to **Maximum Performance**.

1. Go to **Control Panel** > **System and Security** > **Power Options**.

2. For your active power plan, click **Change plan settings** > **Change advanced power settings**.

3. Expand **Internet Explorer** > **JavaScript Timer Frequency**, for **On battery** and **Plugged in**, choose **Maximum Performance**.




### Increase data storage limits for websites

Every time you visit a website, Internet Explorer stores the website data as cache, and uses it when you open the website again. This increases your browsing speed. Internet Explorer can store up to a maximum of 10 MB cache data. If your users visit a particular website often, it will store a lot of content on their system, and it may reach the maximum limit of data storage. To avoid this, you may want to increase the data storage limit for your browser.

Here are two ways you can increase the data storage limit for Internet Explorer.

#### Increase data storage limit by using group policy

1. On your keyboard, press the Windows key + R.

2. In the **Run** dialog box, type `gpedit.msc`, and click **OK**.

   **Local Group Policy Editor** opens.

3. Navigate to **Computer Configuration** > **Administrative Templates** > **Windows Components** > **Internet Explorer** > **Internet Control Panel** > **General Page** > **Browsing History**.

4. In the right pane, double-click the setting **Set default storage limits for websites**.

5. In the **Set default storage limits for websites** dialog box, click **Enabled**, and then in the **Options** section, in the **Set default storage limit for websites** field, add the required limit.

6. Click **Apply**, and then click **OK**.

7. Close Local Group Policy Editor, and restart the computer.

#### Increase data storage limit by using Registry Editor

1. On your keyboard, press the Windows key + R.

2. In the **Run** dialog box, type `regedit`, and click **OK**.

   **Registry Editor** opens.

3. Navigate to the key: HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft.

4. Create a subkey **Internet Explorer** inside **Microsoft**.

   a. Right-click **Microsoft**, and then click **New** > **Key**.

   b. Type **Internet Explorer** as the name of the subkey.

5. Similarly, create a subkey **BrowserStorage** in the newly created subkey **Internet Explorer**.

6. Click the **BrowserStorage** subkey, and in the right pane, right-click, and then click **New** > **DWORD Value**.

7. Type `DeafultDomainCacheLimitInMB` as the name.

8. Double-click the DWORD item you just created.

9. In the **Edit DWORD Value** dialog box, select **Decimal** as **Base**, and then enter the required storage limit in MB, and click **OK**.

10. Close Registry Editor, and restart the computer.

## Network connections settings

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

**To change the network connection order**

1. Right-click **Start** and then click or tap **Run**.

2. Type: `control netconnections` and then click or tap **OK**.

3. Click or tap **Organize** > **Layout** > and verify **Menu bar** is checked.

4. Click or tap **Advanced** > **Advanced Settings**.

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

## Antivirus or malware application settings

Depending on your antivirus or malware application settings, virus scanning can block certain files, making them inaccessible to other applications and causing an adverse effect on Dynamics 365 performance.

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

- Check for any interference from desktop security software. Some antivirus programs include a feature known as ScriptScan that can affect the performance of Dynamics 365. Most programs have functionality to disable scanning on certain websites. Make sure that the Dynamics 365 URL is added to this list. For McAfee specifically, see the following KB articles for this setting:

  - McAfee Knowledge Base Article: KB65382

  - Microsoft Support Knowledge Base Article: KB924341

- If you use other antivirus software, make sure that the URL of the Dynamics 365 website is included in the trusted zone for the virus scanning, and disable on-access scanning for the Dynamics 365 website. For more information, see the specific antivirus application documentation.

## Important email messages from Microsoft Dynamics 365

Microsoft occasionally sends out email messages to Dynamics 365 users or administrators. These messages provide information about how to use Dynamics 365 and also contain important billing or upgrade details.

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

- **crmonl@microsoft.com**. This email alias sends information about updates to the service.
- **billing@microsoft.com**. This email alias sends information about Dynamics 365 billing.
- **msonlineservicesteam@microsoftonline.com**. This email alias sends informational email messages when you sign up for Dynamics 365.

## Available resources for Microsoft Dynamics 365 users

We want you and your organization to take full advantage of the extensive content and materials available that can help your business be more successful while you are using Dynamics 365. For a list of available resources, including training materials and information about how to support your online organization, see the Help and additional resources.

## Technical support for Microsoft Dynamics 365

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

**Maximize your technical support experience**

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

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

  For example, installation issues with Dynamics 365 for Outlook.

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

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

- What were you doing in Dynamics 365 when the error occurred?

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

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

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

- Does the issue affect all users or a certain type of Dynamics 365 security role or only certain users?

  When possible, provide log files (if you know how to find them). This applies to applications such as Dynamics 365 for Outlook or Microsoft Dynamics CRM Email Router. The following table lists the location of the log or trace files for these applications.

| Logs or Traces | Log File Location |
| --- | --- |
| Dynamics 365 for Outlook logs | %Userprofile%\Local Settings\Application Data\Microsoft\MSCRM\Logs |
| Dynamics 365 for Outlook Trace files | %Userprofile%\Local Settings\Application Data\Microsoft\MSCRM\Traces |
| Dynamics 365 E-mail Router logs | %Userprofile%\AppData\Roaming\Microsoft\MSCRM\Logs |

### See also

Set up a Dynamics 365 organization

# Analyze and improve data query performance

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can analyze and optimize query performance using the Data Performance view, which provides an aggregated list of entities with long-running queries. A long running query is defined as a query that takes three seconds or longer to complete. Typical examples of a component that can have a long running query is a plug-in with custom FetchXML or a sub-grid or view. When you optimize an entity that has long-running queries, it could significantly reduce the amount of time the query takes to load. Behind the scenes, optimizations add one or more SQL Server indexes.

## Impact of adding or removing optimizations

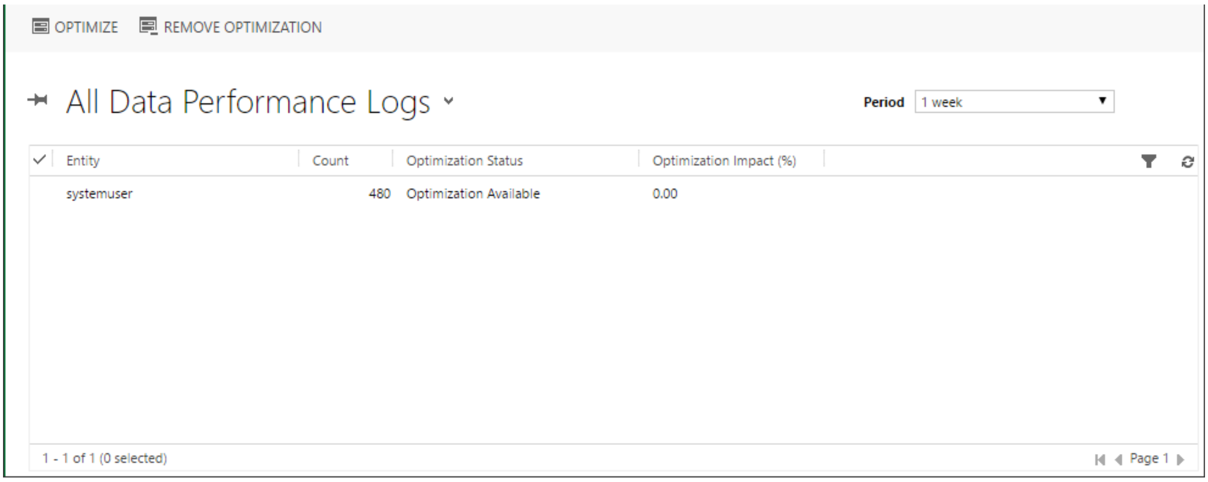
Optimizations may significantly improve the performance of slow running queries. However, optimizations require storage space. Before you add an optimization carefully consider the entity to be optimized and keep the following best practices in mind.

- Applying an optimization does not guarantee query performance improvement. Additionally, some optimizations can improve read performance, but cause a degradation in update performance.
- Only optimize for entities that are frequently used. For example, a commonly used custom view for a sales department.
- Review the impact of adding an optimization and remove optimizations that are not useful. As part of your decision to keep an optimization, you should determine if the performance tradeoff is acceptable.
- Depending on the number of tables related to the entity, some entities cannot have more than twenty optimizations.

> **NOTE**
> The Data Performance feature is available with Dynamics CRM Online 2016 Update 1 and Dynamics 365 (online).

## Use the All Data Performance Logs view to apply or remove an optimization

1. Go to **Settings** > **Administration** > **Data Performance**.
2. In the **All Data Performance Logs** view, if one or more long running entity queries are detected, log items are displayed in the view. If several items appear in the view, you can sort by the **Count** or **Optimization Impact** columns to easily identify the most used queries that do not already have an optimization. Notice that out-of-box and custom entity queries that complete within three seconds aren't displayed in the view.




The columns displayed in the view provide information that can help you determine whether to add an optimization or not.

- **Count**. Indicates the number of times a query has been executed, which indicates the popularity of the query.
- **Optimization Status**. Indicates whether an optimization has been created for the entity. **Optimization Available** indicates that the entity does not have an optimization applied or that a new optimization is available for an entity that already has at least one optimization.
- **Optimization Impact**. All potential optimizations begin with an optimization impact value of 0. Potential optimizations have no impact measurement yet because the optimization hasn't been applied. Over time, after an optimization is applied by clicking **OPTIMIZE**, an integer value is displayed that represents query performance impact. For example, after one week since the optimization was applied, the value that appears can help indicate whether an optimization has improved or degraded query performance for the given entity. A negative value suggests an improvement in query performance, whereas a positive number suggests a degradation in query performance. So, an optimization applied one week ago that has a value of -10% suggests a 10 percent improvement in query performance.

3. Select the entity that you want to create an optimization for, and then click **OPTIMIZE**. To remove an applied optimization, click **REMOVE OPTIMIZATION**.

   Optimizations take effect immediately after they are applied. However, for entities that have large tables, it can take two or more hours before the optimization fully takes effect. Optimizations are processed as an asynchronous process and can be viewed in the **Settings** > **System Jobs** area of Dynamics 365. Notice that an optimization may not be completely applied even after the system job is completed because the actual index must be built in the back-end storage engine.

### See also

[Performance tuning and optimization]

# Manage your data

10/29/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Managing data in Dynamics 365 includes importing data into Dynamics 365, cleaning up duplicate records, deleting data in bulk, and securing sensitive data through data encryption.

# Add or remove sample data

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Sample data gives you something to experiment with as you learn Dynamics 365, and helps you see how data is organized in the system. At some point, you'll probably want to remove the sample data.

Or, if sample data isn't installed on your system, you may want to add it for training purposes. Later, when you're ready, you can remove it.

> **IMPORTANT**
> Use sample data to learn and play around with system features. However, to avoid unwanted results, don't associate it with any data you actually need.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Data Management**.
3. Click **Sample Data**. You'll see a message that tells you whether the sample data is currently installed.
4. Do one of the following:

   Click **Remove Sample Data**, and then click **Close**.

   -OR-

   Click **Install Sample Data**, and then click **Close**.

**See also**

Work with accounts and contacts Create or edit an opportunity

# Import data (all record types) from multiple sources

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Importing data is often the first important task that you need to perform after you have installed Dynamics 365 Customer Engagement. You can import data from various Dynamics 365 systems and data sources into standard and customized fields of most business and custom entities in Dynamics 365. You can include related data, such as notes and attachments. To assure data integrity, you can enable duplicate detection that prevents importing duplicate records. More information: Detect duplicate data. For more complex data import scenarios, you can write code using the data import web service. More information: Import data using web services.

Preliminary steps before you import the data into Dynamics 365 Customer Engagement include:

1. Preparing source data files in one of the following formats: comma-separated values (.csv), XML Spreadsheet 2003 (.xml), Compressed (.zip) or text files. You can import data from one source file or several source files. A source file can contain data for one entity type or multiple entity types.
2. Preparing data maps for mapping data contained in the source file to the Dynamics 365 record fields. You must map every column in the source file to an appropriate field. Unmapped data isn't imported. More information: Select a data map

There are several ways to import data into Dynamics 365:

1. To import large volumes of data, we recommend a programmatic way, as most efficient. When you import data programmatically, you gain additional capabilities that are not available when you use other methods of importing data. These advanced capabilities include viewing stored source data, accessing error logs and creating data maps that include complex transformation mapping, such as concatenation, split, and replace.
2. For smaller import jobs, you can use the Import Data Wizard tool included in the Dynamics 365 web application. For information about the Import Data Wizard or how to import specific record types, see Import accounts, leads, or other data.

   > **NOTE**
   > For the Import Data Wizard, the maximum file size for .zip files is 32 MB; for the other file formats, it's 8 MB.
   >
   > With the Import Data Wizard, you can specify the "Map Automatically" option. The wizard automatically maps all the files and the column headings with Dynamics 365 record types and fields if:
   >
   > - The file names exactly match the display name of the record type.
   >   - The column headings of the file you are importing exactly match the display names of the fields in the record.

3. To add data for an individual record, the quickest way is to use **Quick Create** from the nav bar or **New** from the entity form.

**See also**

Detect duplicate data

# Download a template for data import

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Whether your data is stored in spreadsheets, databases, or other systems, you'll want to import the data into Dynamics 365 so you can keep track of all your customer information in one place. You use templates for importing many types of records, such as accounts, leads or cases. There is a complete list in the Templates for Data Import wizard.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Data Management**.
3. Choose **Templates for Data Import**.
4. In the **Templates for Data Import** dialog box, choose the record type that you want to download the template for, and then select **Download**.
5. In the file download box, click **Save** or **Save as** and navigate to a location for the file.
6. Choose **Close**.

### See also

Import accounts, leads, or other data
Import contacts

# Detect duplicate data so you can fix or remove it

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To determine whether a record is a potential duplicate, Dynamics 365 uses duplicate detection rules. When publishing a duplicate detection rule, a matchcode is created for each existing record. A matchcode is also created when a record is created or updated. When a record is in the process of being created or updated, its matchcode can be checked automatically against the matchcodes of existing records. By default, Dynamics 365 has simple duplicate detection rules for accounts, contacts, and leads. For example, you detect duplicates by matching the record fields, such as email address, first name, and last name.

Duplicate detection works by comparing generated match codes of existing records with each new record being created. These match codes are created as each new record is created. Therefore, there is potential for one or more duplicate records to be created if they are processed at the exact same moment. In addition to detecting duplicates as they are created, you should schedule duplicate detection jobs to check for other potential duplicate records.

> **NOTE**
> Duplicate detection works with Dynamics 365 for tablets, but isn't available for Dynamics 365 for phones.

> **IMPORTANT**
> You have to be a system administrator or a system customizer to create, enable, and publish duplicate detection rules for your organization.
>
> After publishing a duplicate detection rule, increasing the length of fields that are included in the duplicate detection criteria goes undetected. The field length could exceed the matchcode length limit and not be verified. This may result in duplicates not being detected.
>
> You can create multiple detection rules for the same entity type. However, you can publish a maximum of five duplicate detection rules per entity type at one time.

You can detect duplicates:

- When you create or update records for entities that enabled for duplicate detection. This includes records created with Dynamics 365 for Outlook and tracked in Dynamics 365 web application. The duplicate detection dialog is only displayed for the records created or updated in the Dynamics 365 user interface (UI). For example, for records created by a workflow, the duplicate detection dialog is not displayed.

  > **NOTE**
  > Dynamics 365 has the ability to detect duplicates for the updated UI entities when you create or update records using entity forms or grid views in the Dynamics 365 web application.

- When Dynamics 365 for Outlook goes from offline to online.
- During data import. You can specify whether or not to check for duplicates during the import.

> **NOTE**
>
> Duplicates can't be detected when a user merges two records, converts a lead, or saves an activity as completed. Duplicates also aren't detected when a user changes the status of a record, such as activating or reactivating it.

To check for duplicates in the web application, you can use **Detect Duplicates** capability provided in **More Commands** (•••) on the nav bar in the grid. The duplicate records are also detected when you import data programmatically or through Import Data Wizard. In addition, you can check for duplicates by running scheduled duplicate detection jobs. For step-by-step instructions on how to set up the duplicate detection job, see Run system jobs to detect duplicates.

A duplicate detection job runs in the background while you do other things in Dynamics 365. You can request email notification from Dynamics 365 upon the completion of a duplicate detection job.

### See also

Import data (all record types)
Check for duplicates
Set up duplicate detection rules
Run system jobs to detect duplicates
Delete bulk records

# Set up duplicate detection rules to keep your data clean

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To maintain the integrity of your data, it's a good idea to have rules in place to reduce duplicate records in the system. Dynamics 365 includes default duplicate detection rules for accounts, contacts, and leads, but not for other types of records. If you want the system to detect duplicates for other record types, you'll need to create a new rule.

After you've created duplicate detection rules, you need to turn duplicate detection on.

1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

   Check your security role

   a. Follow the steps in View your user profile.

   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Data Management**.

3. Choose **Duplicate Detection Rules**.

4. To create a new duplicate detection rule, choose **New**. Type a name and description.

   –OR–

   To edit an unpublished existing duplicate detection rule, choose the duplicate detection rule.

   –OR–

   To edit a published duplicate detection rule, select the rule. On the **Actions** menu, choose **Unpublish**, and then choose the rule.

5. Select the criteria to be used to identify a record as a duplicate.

   a. If you are creating a new rule:

      - In the **Duplicate Detection Rule Criteria** section, in the **Base Record Type** list, choose the type of record that this rule applies to. For example, select **Contacts**.

      - In the **Matching Record Type** box, choose the type of record to compare. In most cases, you'll probably want to use the same record type for **Base Record Type** and **Matching Record Type**. It's also useful to be able to compare different record types. For example, you might want to compare the **Email** field in Contacts to the **Email** field in Leads.

   b. If you want the rule to consider only active records while detecting duplicates, select the **Exclude inactive matching records** check box. You should also select this check box if your duplicate detection rule criteria are based on a status field.

   c. If you want the rule to be case-sensitive, select the **Case-sensitive** check box.

d. If you selected different record types for the base and matching record types, for each new criterion, in the **Base Record Field** column, choose **Select**, and then choose a field name. In the same row, in the **Matching Record Field** column, choose **Select**, and then choose a field name.

   - OR -

   If you selected the same record types for the base and matching record types, for each new criterion, in the **Field** column, choose **Select**, and then choose a field.

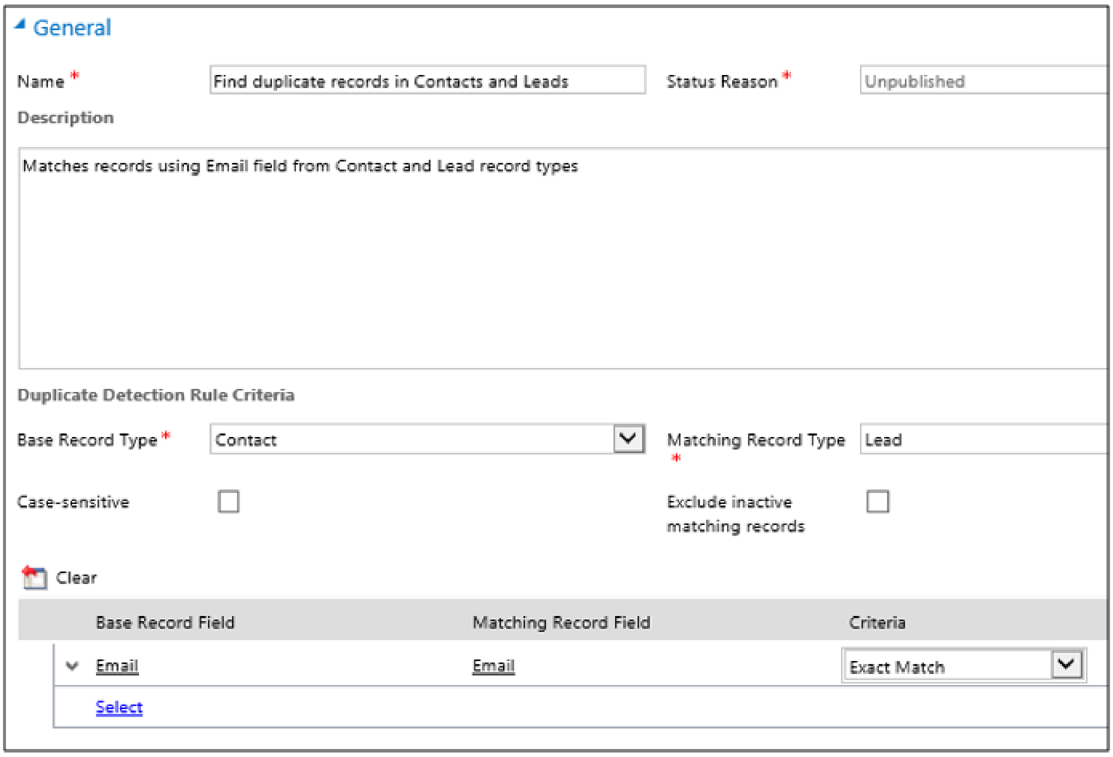
e. In the same row, in the **Criteria** column, choose **Select**, and then choose an operator. For example, select **Exact Match**.

f. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, choose **Enter Value**, and then enter the number of characters to compare.

g. If you don't want the rule to consider blank fields (null values) as equal while identifying duplicates, select the **Ignore Blank Values** check box.

> **IMPORTANT**
> If the duplicate detection rule contains only one condition, blank values are ignored during duplicate detection job.

The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the **Current matchcode length** value shown at the bottom of the criteria list.




6. When you're finished adding criteria, choose **Save and Close**.

7. To make the new or changed duplicate detection rule usable, select the rule, and then choose **Publish**.

   When you publish a duplicate detection rule, a matchcode is created for every record in the matching record type for that rule. You can publish only five rules for the same base record type (Account, for example) at a time. You might need to delete or unpublish an existing rule if you bump up against this limit.

**NOTE**

- We recommend that you set the duplicate detection criteria on a field that has unique values, for example, **Email**.
  - You can have more than one duplicate detection rule for each record type.

### See also

Turn duplicate detection rules on or off for the whole organization
Run bulk system jobs to detect duplicate records
Merge duplicate records for accounts, contacts, or leads
Developer's Guide: Duplicate Rule entities

# Turn duplicate detection rules on or off for the whole organization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To maintain the integrity of your data, it's a good idea to set up duplicate detection rules to reduce duplicate records in the system. Remember that after you create duplicate detection rules, you need to turn them on.

1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

   Check your security role

   a. Follow the steps in View your user profile.

   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Data Management**.

3. Choose **Duplicate Detection Settings**.

4. Select or clear the **Enable duplicate detection** check box.

   > **NOTE**
   > If your system contains a large number of records, checking for duplicates can impact performance.

5. If you're turning duplicate detection on, select or clear the check boxes to set when duplicates are detected:

   - **When a record is created or updated**

     The system checks for duplicates when a user enters or updates records.

     > **IMPORTANT**
     > Duplicates aren't detected when a user merges two records, activates or deactivates a record, or saves a completed activity.

   - **When Dynamics 365 for Outlook goes from offline to online**

     For users of Dynamics 365 for Outlook, the system detects duplicates when the user synchronizes their data after working offline, as long as users have enabled duplicate detection in Outlook. To enable duplicate detection in Outlook, choose **File > Dynamics 365 > Options**. Choose the **Local Data** tab, and then select the **Enable duplicate detection during offline to online synchronization** check box.

   - **During data import**

     When you use the Import Data wizard to bring in contacts, leads, accounts, or other types of data, the wizard detects any duplicate records as long as you enable duplicate detection in the wizard. More information: Import accounts, leads, or other data

6. Choose **OK**.

**See also**

Set up duplicate detection rules to keep your data clean
Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook
Run bulk system jobs to detect duplicate records

# Run bulk system jobs to detect duplicate records

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

To maintain the integrity of system data, you should check for duplicates regularly to make sure that users don't inadvertently create duplicate contacts, accounts, leads, or other types of records.

The Check for Duplicates wizard helps you set up a bulk "job" that finds and cleans up duplicate records. You can schedule the job to run daily, and you can receive an email confirmation when the job finishes.

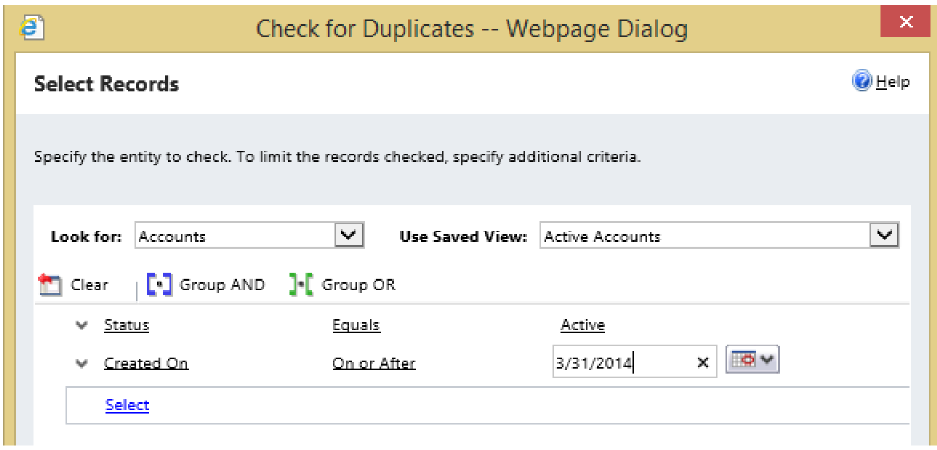
> **NOTE**
> If you haven't already done so, create and publish duplicate detection rules, and turn duplicate detection on before you run the wizard. More information: Set up duplicate detection rules to keep your data clean

1. Go to **Settings** > **Data Management**.
2. Click **Duplicate Detection Jobs**.
3. Click **New**, or select the name of the duplicate detection job you want to run.

   You'll see the Duplicate Detection wizard, which helps you create a job to check for duplicates.
4. Click **Next**.
5. In the **Look for** drop-down list, select the record type that you want to check for duplicates.

   > **NOTE**
   > What you see in this list depends on which duplicate detection rules are published. More information: Set up duplicate detection rules to keep your data clean

6. In the **Use Saved View** drop-down list, select a view if you want to limit the records searched to records in that view. For example, select Active Accounts. When you select a view, Dynamics 365 adds the criteria to search on.
7. To further limit the records searched, click **Select** and then enter the criteria you want.



8. Click **Next**.

9. Accept the default name for the job, or type a different name.

10. Enter the start time for the job, and enter how often to run the job in days. (To run the job daily, type `1`.)

11. If you want to receive an email confirmation when the job is completed, select the **Email options** check box. Enter an additional email address, if desired.

12. Click **Next**, and then click **Submit**.

### See also

Set up duplicate detection rules to keep your data clean
Turn duplicate detection rules on or off for the whole organization
View and take action on bulk deletion jobs
Detect duplicate data

# Remove a large amount of specific, targeted data with bulk deletion

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The *bulk deletion* feature helps you to maintain data quality and manage the consumption of system storage in Dynamics 365 by deleting data that you no longer need.

For example, you can delete the following data in bulk:

- Stale data.
- Data that is irrelevant to the business.
- Unneeded test or sample data.
- Data that is incorrectly imported from other systems.

With bulk deletion you can perform the following operations:

- Delete data across multiple entities.
- Delete records for a specified entity.
- Receive email notifications when a bulk deletion finishes.
- Delete data periodically.
- Schedule the start time of a recurring bulk delete.
- Retrieve the information about the failures that occurred during a bulk deletion.

## Delete bulk data

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**.
3. Choose **New** to run the **Bulk Deletion Wizard** to create a bulk deletion job with the records you want to delete.

For information about how to implement bulk delete in code, see Delete data in bulk.

**See also**

Manage your data
Data Encryption

# View and take action on bulk deletion jobs

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can view the status of, pause, postpone, and resume a system job that you created using **Bulk Record Deletion**.

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**.
3. In the **Bulk Record Deletion** window, you can perform the actions described in the following table.

| TO | DO THIS |
|---|---|
| View status | Look in the **Status Reason** column. |
| View detailed status, including success and failure information | Select the bulk-deletion job. |
| View queries submitted for deletion | Select the bulk-deletion job, and then under **Information**, choose **Properties**. |
| Review the errors | Select the bulk-deletion job, and then under **Related**, choose **Failures**. |
| Pause a bulk-deletion job | 1. Select the bulk-deletion job, and then on the Actions menu, choose **Pause**.<br>2. When the confirmation message appears, choose **OK**.<br>**Note:** Bulk deletion jobs of fewer than 1,000 records cannot be paused. |
| Postpone a bulk-deletion job | 1. Select the bulk-deletion job, and then on the Actions menu, choose **Postpone**.<br>2. When the confirmation message appears, choose **OK**. |
| Resume a bulk-deletion job | 1. Select the bulk-deletion job, and then on the Actions menu, choose **Resume**.<br>2. When the confirmation message appears, choose **OK**. |
| Cancel a bulk-deletion job | 1. Select the bulk-deletion job, and then on the Actions menu, choose **Cancel**.<br>2. When the confirmation message appears, choose **OK**. |

| TO | DO THIS |
| --- | --- |
| Modify recurrence of a bulk-delete job | 1. Select the bulk-deletion job, and then on the Actions menu, choose **Modify Recurrence**.<br>2. If you select the **Run this job after every** check box, specify the interval after which you want the bulk-deletion job to run, and then choose **OK**.<br><br>If you select the **Run this job after every** check box when you create a bulk-deletion job, the job becomes recurring and is moved to the **Recurring Bulk Deletion System Jobs** view. You can only change the recurrence for these recurring bulk-deletion jobs. |

## See also

Manage your data (for admins)
Delete bulk records

# Monitor and manage system jobs

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Several Dynamics 365 features use system jobs to perform tasks automatically, including workflows, import, and duplicate detection, running independently or in the background.

You can monitor them to ensure that they run smoothly or have completed successfully. Go to **Settings** > **System Jobs** to see a grid view of system jobs.

## Monitoring system jobs

If there is a problem with a system job, you can cancel, postpone, pause, or resume it. Select a job and then select the **Actions** menu.

- **Canceling system jobs**

  You cannot resume a canceled system job.

- **Postponing completion of system jobs**

  Postponing an active system job stops any current and subsequent actions. You can specify a later time when you want the system job to restart.

- **Pausing system jobs**

  You can resume a paused system job.

- **Resuming paused system jobs**

  Resuming restarts a system job that was paused.

  > **TIP**
  >
  > 1. If a system job fails, you can view the details about what steps failed and what the problems may have been. First, open the system job record. To display details about system job failures, move your pointer over the warning symbols.
  >    2. To view system job failures in a format that you can print or copy and paste, click the **Print** button.

> **NOTE**
>
> You cannot make changes to the status of a system job that has been completed or canceled.

# Audit data and user activity for security and compliance

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The Dynamics 365 auditing feature logs changes that are made to customer records and user access so you can review the activity later. The auditing feature is designed to meet the auditing, compliance, security, and governance policies of many regulated enterprises.

The audit logs help the Dynamics 365 Administrator answer questions such as:

- Which user was accessing the system and when?
- Who updated this field value on this record and when?
- What was the previous field value before it was updated?
- What actions has this user taken recently?
- Who deleted this record?
- What locale was used to make the update?

The following operations can be audited:

- Create, update, deactivate, and delete operations on records.
- Changes to the sharing privileges of a record.
- The N:N association or disassociation of records.
- Changes to security roles.
- Audit changes at the entity, attribute, and organization level. For example, enabling audit on an entity.
- Deletion of audit logs.
- For changes made to entity fields that can be localized, such as the Product entity name or description fields, the locale ID (LCID) appears in the audit record.

System administrators and customizers can start or stop auditing for an organization.

> **IMPORTANT**
> For Dynamics 365 (on-premises), you may notice that auditing can significantly increase the size of the organization database over time. You can delete audit logs by going to **Settings** > **Auditing** > **Audit Log Management**. Additionally, you may want to stop auditing for maintenance purposes. Stopping auditing stops tracking for the organization during the period until auditing is started again. When you start auditing again, the same auditing selection is maintained that was previously used.

## Start or stop auditing for an organization

This task requires the system administrator or customizer security role or equivalent permissions.

1. Go to **Settings** > **Administration**.
2. Choose **System Settings**.
3. On the **Auditing** tab, select the **Start Auditing** check box to start auditing. Clear the **Start Auditing** check box to stop all auditing.
4. Select the entities you want to track. To start or stop auditing on specific entities, select or clear the following check boxes:
   - **Audit user access**. Tracks when a user accesses Dynamics 365 including the user name and time.
   - **Common Entities**. Tracks common entities like Account, Contact, Goal, Product, and User.
   - **Sales Entities**. Tracks sales-related entities lilke Competitor, Opportunity, Invoice, Order, and Quote.
   - **Marketing Entities**. Tracks Campaign entity activity.
   - **Customer Service Entities**. Tracks Case, Contract, Queue, and Service entity activity.
5. Click **OK**.

## View audit logging details

System administrators can see activity for the entities that are enabled for audit logging.

1. Go to **Settings** > **Auditing**.
2. Choose **Audit Summary View**.
3. In the **Audit Summary View**, you can do the following:
   - Click **Enable/Disable Filters** to turn on filtering. Then, you can filter on a specific event, such as **Delete** actions.
   - Choose an **Event** to view specific details about the activity, such as field changes that were made during an update to a record and who performed the update.
   - Click the **Refresh** button to view the most recent activity.

## Enable or disable entities and fields for auditing

System administrators or customizers can change the default audit settings for entities and for specific fields for an entity.

**To enable or disable auditing for an entity**

1. Go to **Settings** > **System**.
2. Click **Auditing**.
3. In the **Audit** area, choose **Entity and Field Audit Settings**.
4. Under **Components**, expand **Entities**.
5. Open the entity for which you want to enable or disable auditing.
6. To start auditing, on the **General** tab, in the **Data Services** section, select the **Auditing** check box to enable auditing, or clear the **Auditing** check box to disable it.

   By default, when you start or stop auditing for an entity, you also start or stop auditing for all the fields of this entity.

7. Click **Save**.

8. Publish the customization. To publish for a single entity, choose the entity, such as Account, and then click **Publish** on the toolbar.

   **To enable or disable auditing for specific fields on an entity**

9. Under the entity for which you want to enable or disable auditing with specific fields, click **Fields**.

10. To enable or disable a single field, open the field and in the Auditing section, select **Enable** or **Disable**.

    To enable or disable more than one field, select the fields you want, and then on the toolbar click **Edit**. In the **Edit Multiple Fields** dialog box, in the Auditing area, click **Enabled** or **Disabled**.

11. Click **Save**.

12. Publish the customization. To publish for a single entity, choose the entity, such as Account, and then click **Publish** on the Actions toolbar.

### See also

Manage security, users and teams
Getting started with customization

# Enhance security by encrypting your data

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 uses standard SQL Server cell level encryption for a set of default entity attributes that contain sensitive information, such as user names and email passwords. This feature can help organizations meet FIPS 140-2 compliance.

For Dynamics 365 (online), all new and upgraded organizations use data encryption by default. Data encryption can't be turned off.

Dynamics 365 users who have the system administrator security role can change the encryption key at any time.

## Change an organization encryption key

1. Go to **Settings** > **Data Management**.
2. Click **Data Encryption**.
3. In the **Change Encryption Key** box type the new encryption key and then select **Change**.
4. Select **OK** in the confirmation message and then click **Close** to exit the Data Encryption page.
5. We recommend that you copy the key to a safe place. Copy your organization data encryption key

## Copy your organization data encryption key

We strongly recommend that you make a copy of your data encryption key.

1. Sign in to Dynamics 365 as a user with the system administrator security role.
2. Go to **Settings** > **Data Management**.
3. Click **Data Encryption**.
4. In the **Data Encryption** dialog box, select **Show Encryption Key**, in the **Current encryption key box** select the encryption key, and copy it to the clipboard.
5. Paste the encryption key in to a text editor, such as Notepad.

   > **WARNING**
   > By default, Dynamics 365 generates a passphrase that is a random collection of Unicode characters. Therefore, you must save the system-generated passphrase by using an application and file that supports Unicode characters. Some text editors, such as Notepad use ANSI coding by default. Before you save the passphrase using Notepad, select **Save As**, and then in the **Encoding** list, select **Unicode**.

6. As a best practice, save the text file that contains the encryption key on a computer in a secure location on an encrypted hard drive.

**See also**

SQL Server Encryption

FIPS 140 Evaluation

Manage Your Data

Manage configuration data

# Remove user personal data

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

After a user is deleted by the global admin from the Office 365 Admin center, the user's personal data can be removed from all tenant instances. A user is deleted from the Office 365 Admin center when:

1. The user leaves the company. In this scenario, the user record remains in the tenant's Active Directory for 30 days before the record is deleted.

   -Or-

2. The user requests their personal data be deleted. The user record is deleted immediately.

Once the user record is deleted from Active Directory, Dynamics 365 system admins can remove the user's personal data from all instances.

## Remove user personal data via User form

When the user record is deleted from Active Directory, the following message is displayed on the User form:

"This user's information is no longer managed by Office 365. You can update this record to comply with the GDPR by removing or replacing all personal data."

To remove personal data:

1. Click **Settings** > **Security** > **Users**.
2. Select **Disabled Users** view.
3. Select a user.
4. Remove personal data, and then click **Save**.

## Remove user personal data via Excel Import/Export

1. Click **Settings** > **Security** > **Users**.
2. Select **Disabled Users** view.
3. Create an Excel template with all the user personal data columns that you want to update.
4. Click on **Download File**.
5. Open the downloaded Excel file, make your updates, and then save the file.
6. Return to the **Disabled Users** view window and click **Import Data**.
7. Choose your updated Excel in the Upload data file dialog box.
8. Make all the necessary changes on the **Map Fields** window.
9. Click **Next** and **Submit**.

## Remove user personal data using Web services

You can also update the data for a disabled user using the Web API or Organization service. The user information is stored in the SystemUser entity, and you can update data in any of the writeable attributes in the SystemUser entity. For examples about updating data in a record, see:

- Update and delete entities using the Web API

- Use the Entity class for create, update and delete

**See also**

Analyze and share your data with Excel templates

# Manage storage

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can manage your organization's data storage capacity in connection with your subscription to Dynamics 365 (online). The type of subscription you purchase determines the amount of storage initially allocated to your organization. If you run out of storage, you can add more.

You can also gain storage by deleting certain types of unnecessary data in Dynamics 365 (online). For information on deleting data, see: Free storage space in Dynamics 365.

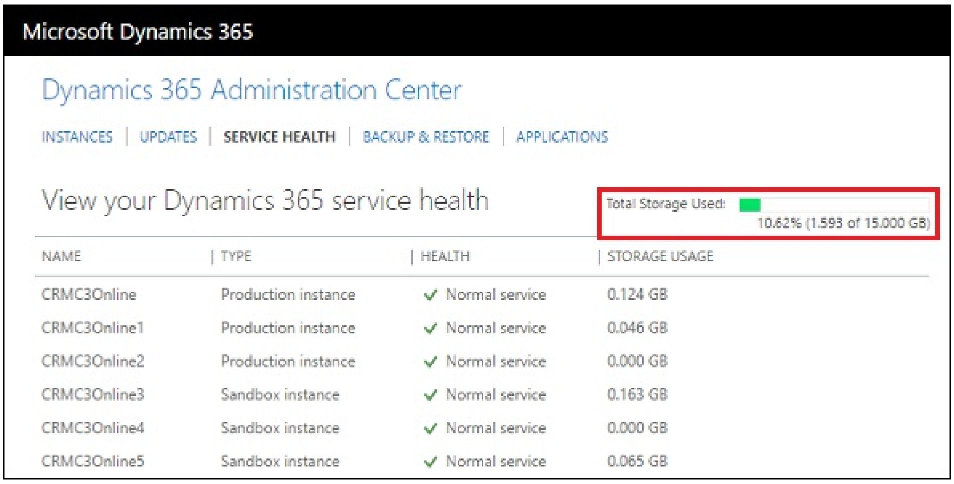
For information on storage amounts included with the various Dynamics 365 (online) plans, see: Dynamics 365 pricing.

## Monitor the amount of storage your organization is using

Monitor your Dynamics 365 (online) storage to make sure you've got lots of capacity for growth.

If your total storage used is 80% or more of capacity, Dynamics 365 admins will receive email notifications and alerts will appear on the Service Health page.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Choose the **Service Health** tab.



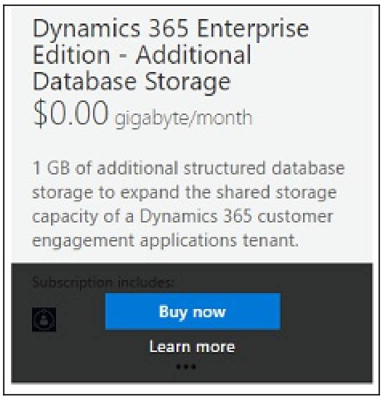

## Add storage to Dynamics 365 (online)

As a global or billing administrator, you can purchase additional storage for your company on Office 365 Admin Center by following the steps below. Learn how to find your global or billing administrator.

If you purchase through volume licensing or a cloud solutions provider, please contact your partner directly.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Billing** > **Purchase Services**.
3. Scroll down to the **Add-on subscriptions** section and mouse over the **Dynamics 365 - Additional**

**Database Storage** tile.




4. Click **Buy now**, and then proceed through the order process.

   If you paid for the subscription by credit card, any additional storage space that you order will be available immediately after you receive an order confirmation. If you're invoiced for subscription payments, you may be asked to complete a credit check. In this case, the additional storage will not be available until the credit check is passed.

# What happens if you exceed your storage limit?

Dynamics 365 System administrators will receive frequent email notifications which will cease once additional storage is added or storage is reduced to below the limit.

### See also

Manage Microsoft Dynamics 365 (online) instances
Free storage space in Microsoft Dynamics 365
Manage subscriptions, licenses, and user accounts
Global and Service administrators can administer Dynamics 365 without a license

# Free storage space

8/24/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

These are ways to reduce the amount of storage space used by removing or deleting different types of information from Dynamics 365. Use one or more of these methods to control your total data storage usage with Dynamics 365. You can delete certain categories of data as the need arises, or you can set up bulk deletion jobs to reoccur at set intervals.

**WARNING**

The suggestions in this topic include deleting notes, attachments, import history, and other data. Before you delete data, be sure that the data is no longer needed because you cannot retrieve deleted data. There is no “undo” to restore your data once it has been deleted. This means it may make more sense for you to increase the amount of storage space you have with your Microsoft Dynamics 365 subscription instead of reducing the amount of storage space used.

**NOTE**

Except for methods 3 and 5, all these methods require that you have an administrator Dynamics 365 security role, such as System Administrator. This gives you permission to delete records in bulk and to delete system jobs.

After performing actions to free up storage, the system can take up to 24 hours to update storage information. We recommend waiting up to 24 hours and monitoring your storage.

## Method 1: Delete bulk email and workflow instances using a bulk deletion job

**WARNING**

If you delete this data, you will no longer be able to tell if an email was sent through bulk email or if a workflow rule ran against a record. The emails that were sent and the actions that ran against the record in the workflow will remain.

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**. In the menu bar, choose **New**. This opens the Bulk Deletion Wizard.
3. Choose **Next**.
4. In the **Look for** list, select **System Jobs**.
5. In the search criteria area, add criteria similar to the following:

   **System Job Type** – **Equals** – **Bulk E-mail**; **Workflow**;

   **Status Reason** – **Equals** – **Succeeded**

   **Completed On** – **Older Than X Months** – 1
6. Group the three criteria rows:

a. Choose the arrow next to each criteria row, and then choose **Select Row**.

b. With all three rows selected, choose **Group AND**.

7. Choose **Next**.

8. In the **Name** text box, type a name for the bulk deletion job.

9. Select a date and time for the job start time; preferably a time when users are not in Dynamics 365.

10. Select the **Run this job after every** check box, and then in the **days** list, select the frequency you want the job to run.

11. If you want a notification e-mail sent, select the **Send an e-mail to me (email@domain.com) when this job is finished** check box.

12. Choose **Next**, review the bulk deletion job, and then choose **Submit** to create the recurring job.

## Method 2: Evaluate and delete suspended workflows

Sometimes workflows will enter a suspended state because there is a condition that will never be met or some other reason that will not allow the workflow to continue.

> **WARNING**
> Some workflows will be in a suspended state because they are waiting for a condition that has not yet been met, which is expected. For example, a workflow may be waiting for a task to be completed.

1. Choose **Advanced Find**.

2. In the **Look for** list, select **System Jobs**.

3. In the search criteria area, add criteria similar to the following:

   **System Job Type** – **Equals** – **Workflow**

   **Status Reason** – **Equals** – **Waiting**

4. Group the two criteria rows:

   a. Choose the arrow next to each criteria row, and then choose **Select Row**.

   b. With all three rows selected, choose **Group AND**.

5. Choose **Find**.

6. In the results window, you can open each item to determine whether the workflow can be deleted.

## Method 3: Remove email attachments using Advanced Find

> **WARNING**
> If you delete this data, the attachments will no longer be available in Dynamics 365. However, if you have them saved in Office Outlook, they will still be there.

1. Choose **Advanced Find**.

2. In the **Look for** list, select **Email Messages**.

3. In the search criteria area, add criteria similar to the following:

**Email Attachments (Item)**

**File Size (Bytes)** – **Is Greater Than** - In the text box, type a byte value, such as 25000.

4. Choose **Results**.

5. Under **Activities**, you will now have a list of email messages that have attachments that are larger than 'X' bytes. Review the emails and delete the attachments as needed.

## Method 4: Remove email messages with attachments using a bulk deletion job

> **WARNING**
>
> If you delete this data, the email messages and their associated attachments will no longer be available in Dynamics 365. However, if you have them saved in Office Outlook, they will still be there.

1. Go to **Settings** > **Data Management**.

2. Choose **Bulk Record Deletion**, and then in the menu bar, choose **New**. This opens the Bulk Deletion Wizard.

3. Choose **Next**.

4. In the **Look for** list, select **Email Messages**.

5. In the search criteria area, add criteria similar to the following:

   **Status Reason** – **Equals** – **Completed**

   **Actual End** – **Older Than X Months** – 1

   **Email Attachments (Item)**

   **File Size (Bytes)** – **Is Greater Than** – In the text box, type a byte value, such as 25000.

6. Group the first two criteria rows:

   a. Choose the arrow next to each criteria row, and then choose **Select Row**.

   b. With both rows selected, choose **Group AND**.

7. Choose **Next**.

8. In the **Name** text box, type a name for the bulk deletion job.

9. Select a date and time for the job start time; preferably a time when users are not in Dynamics 365.

10. Select the **Run this job after every** check box, and then in the **days** list, select the frequency you want the job to run.

11. If you want a notification e-mail sent, select the **Send an email to me (email@domain.com) when this job is finished** check box.

12. Choose **Next**, review the bulk deletion job, and then choose **Submit** to create the recurring job.

## Method 5: Remove notes with attachments using Advanced Find

> **WARNING**
>
> If you delete this data, notes and their associated attachments will no longer be available in Dynamics 365.

1. Choose **Advanced Find**.
2. In the **Look for** list, select **Notes**.
3. In the search criteria area, add criteria similar to the following:

   **File Size (Bytes)** – **Is Greater Than** – In the text box, type a byte value, such as 1048576.
4. Choose **Results**.
5. You will now have a list of attachments that are larger than the size you specified.
6. Select individual or a multiple attachments, and then choose **Delete** (X).

## Method 6: Remove notes with attachments using a bulk deletion job

> **WARNING**
>
> If you delete this data, notes and their associated attachments will no longer be available in Dynamics 365.

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**, and then in the menu bar, choose **New**. This opens the Bulk Deletion Wizard.
3. Choose **Next**.
4. In the **Look for** list, select **Notes**.
5. In the search criteria area, add criteria similar to the following:

   **File Size (Bytes)** – **Is Greater Than** – In the text box, type a byte value, such as 1048576.

   **Created On** – **Older Than X Months** – 1
6. Group the two criteria rows:
   a. Choose the arrow next to each criteria row, and then choose **Select Row**.
   b. With all three rows selected, choose **Group AND**.
7. Choose **Next**.
8. In the **Name** text box, type a name for the bulk deletion job.
9. Select a date and time for the job start time; preferably a time when users are not in Dynamics 365.
10. Select the **Run this job after every** check box, and then in the **days** list, select the frequency you want the job to run.
11. If you want a notification e-mail sent, select the **Send an email to me (email@domain.com) when this job is finished** check box.
12. Choose **Next**, review the bulk deletion job, and then choose **Submit** to create the recurring job.

## Method 7: Remove bulk duplicate detection jobs and associated copies

## of duplicate records

Every time that a duplicate detection job runs, a copy of each duplicate record is stored in the database as part of the duplicate detection job. For example, if you have 100 duplicate records, every time that you run a duplicate detection job that finds these duplicates, whether it is manual or reoccurring, those 100 duplicate records will be stored in the database under that instance of that duplicate job until the duplicates are merged or deleted, or until the instance of that duplicate detection job is deleted.

1. Go to **Settings** > **Data Management**.
2. Choose **Duplicate Detection Jobs**.
3. Select the duplicate detection job instances you want to delete and then choose **Delete** (X).

   To avoid wasting storage space, make sure duplicates are resolved promptly so that they are not reported in multiple duplicate detection jobs.

## Method 8: Delete bulk import instances using a bulk deletion job

Every time you perform a bulk import, there is a system job associated with that import. The system job details show which records imported successfully and which records failed.

> **WARNING**
> After you delete these bulk import jobs, you will not be able to see what data was imported and you cannot roll back the import.

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**, and then in the menu bar, choose **New**. This opens the Bulk Deletion Wizard.
3. Choose **Next**.
4. In the **Look for** list, select **System Jobs**.
5. In the search criteria area, add criteria similar to the following:

   **System Job Type** – **Equals** – **Import**

   **Status Reason** – **Equals** – **Succeeded**

   **Completed On** – **Older Than X Months** – 1
6. Group the three criteria rows:
   a. Choose the arrow next to each criteria row, and then choose **Select Row**.
   b. With all three rows selected, choose **Group AND**.
7. Choose **Next**.
8. In the **Name** text box, type a name for the bulk deletion job.
9. Select a date and time for the job start time; preferably a time when users are not in Dynamics 365.
10. Select the **Run this job after every** check box, and then in the **days** list, select the frequency you want the job to run.
11. If you want a notification e-mail sent, select the **Send an email to me (email@domain.com) when this job is finished** check box.

12. Choose **Next**, review the bulk deletion job, and then choose **Submit** to create the recurring job.

## Method 9: Delete bulk deletion job instances using a bulk deletion job

When you are bulk deleting data, such as in many of the methods described in this article, a bulk deletion system job is created and can be deleted.

> **WARNING**
> After you delete these jobs, you will lose the history of the prior bulk deletion jobs that you've run.

1. Go to **Settings** > **Data Management**.
2. Choose **Bulk Record Deletion**, and then in the menu bar, choose **New**. This opens the Bulk Deletion Wizard.
3. Choose **Next**.
4. In the **Look for** list, select **System Jobs**.
5. In the search criteria area, add criteria similar to the following:

   **System Job Type** – **Equals** – **Bulk Delete**

   **Status Reason** – **Equals** – **Succeeded**

   **Completed On** – **Older Than X Months** – 1

   > **NOTE**
   > You could also delete jobs that have failed or been canceled.

6. Group the three criteria rows:
   a. Choose the arrow next to each criteria row, and then choose **Select Row**.
   b. With all three rows selected, choose **Group AND**.
7. Choose **Next**.
8. In the **Name** text box, type a name for the bulk deletion job.
9. Select a date and time for the job start time; preferably a time when users are not in Dynamics 365.
10. Select the **Run this job after every** check box, and then in the **days** list, select the frequency you want the job to run.
11. If you want a notification e-mail sent, select the **Send an email to me (email@domain.com) when this job is finished** check box.
12. Choose **Next**, review the bulk deletion job, and then choose **Submit** to create the recurring job.

## Method 10: Delete audit logs

When you enable auditing, Dynamics 365 creates audit logs to store the audit history of the records. You can delete these audit logs to free space when they are no longer needed.

**WARNING**

When you delete an audit log, you can no longer view the audit history for the period covered by that audit log.

1. Go to **Settings** > **Auditing**.
2. In the **Audit** area choose **Audit Log Management**.
3. Select the oldest audit log, then choose **Delete Logs**.
4. In the confirmation message choose **OK**.

**NOTE**

You can only delete the oldest audit log in the system. To delete more than one audit log repeat deleting the oldest available audit log until you have deleted enough logs.

### See also

Manage your data
Data Encryption
Manage Microsoft Dynamics 365 (online) instances

# Fixing Add License Wizard and Add Storage Wizard errors

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You may see an error while running the Add User License Wizard if you have:

- Reached the maximum number of licenses available for your offer.
- Attempted to remove licenses, which would result in less than the minimum number of licenses required by your offer.

> **IMPORTANT**
> To see other offers available to you, on the **Subscription Management** page, under **Application Usage**, click or tap **View Offers**. If you are eligible to change your current offer, the offers will be listed. If you are not eligible for an offer at this time, contact the Dynamics 365 sales team.

You may see an error while running the Add Storage Wizard if you have:

- Reached the storage limit available for your offer.
- The minimum amount of storage for that offer.

If you cannot add storage from your Microsoft Dynamics 365 subscription, it might be that your current offer has a limited amount of storage available.

**See also**

# Recover database space by deleting audit logs

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

When you enable auditing, Dynamics 365 stores the change history for transactions in the form of audit logs in the database. You can delete the old or unwanted logs to clean up the database space.

Caution

When you delete an audit log, you can no longer view the audit history for the period covered by that audit log.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Auditing**.
3. Choose **Audit Log Management**
4. Select the oldest audit log. Then, on the command bar, choose **Delete Logs**.
5. In the confirmation message, choose **OK**.

> **NOTE**
> You can only delete the oldest audit log in the system. To delete more than one audit log, continue to delete the oldest audit log until you have deleted enough logs.

**See also**

Audit data and user activity

# Enable change tracking to control data synchronization

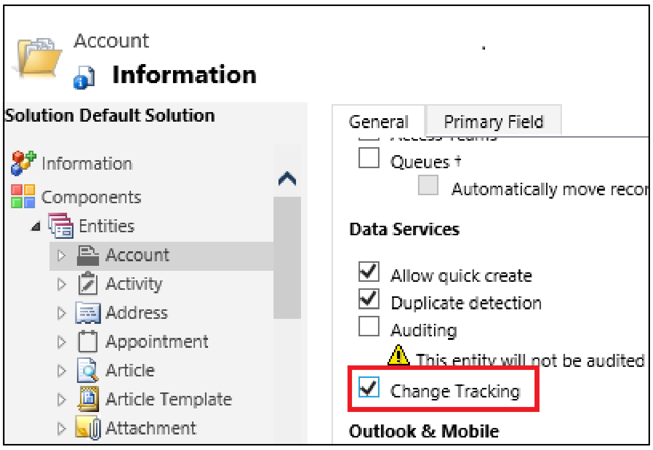
8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Large Dynamics 365 organizations that synchronize their data with external data sources can now enable entities for change tracking. You can export or retrieve a selected set of Dynamics 365 data, and then keep the external data warehouse in sync.

By selecting, or deselecting, change tracking for specific entities you can reduce the load on your server resources and save processing time when extracting Dynamics 365 data and synchronizing it to an external store. You can enable change tracking for both system and custom entities.

1. Go to **Customizations** > **Customize the System**.
2. Select an entity, and under **Data Services**, select the **Change Tracking** check box.




**See also**

# Replicate data to Azure SQL Database

9/21/2018 • 26 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

The Dynamics 365-Data Export Service is an add-on service made available on Microsoft AppSource that adds the ability to replicate Dynamics 365 (online) data to a Azure SQL Database store in a customer-owned Azure subscription. The supported target destinations are Azure SQL Database and SQL Server on Azure virtual machines. The Data Export Service intelligently synchronizes the entire Dynamics 365 data initially and thereafter synchronizes on a continuous basis as changes occur (delta changes) in the Dynamics 365 (online) system. This helps enable several analytics and reporting scenarios on top of Dynamics 365 data with Azure data and analytics services and opens up new possibilities for customers and partners to build custom solutions.

> **NOTE**
>
> You can use the Data Export Service with:
>
> - Dynamics 365 (online)
> - Dynamics 365 (online), version 9.0

For information about the programmatic interface for managing configuration and administration of the Data Export Service, see Data Export Service.

## Prerequisites for using Data Export Service

To start using the Data Export Service, the following prerequisites are required.

**Azure SQL Database service**

- A customer owned Azure SQL Database subscription. This subscription must allow the volume of data that is synchronized.
- Firewall settings. We recommend that you turn off **Allow access to Azure services** and specify the appropriate client IP addresses listed in this topic. More information: Azure SQL database static IP addresses used by the Data Export Service

  Alternatively, you can turn on **Allow access to Azure services** to allow all Azure services access.

  For SQL Server on Azure VM, the "Connect to SQL Server over the Internet" option should be enabled. More information: Azure: Connect to a SQL Server Virtual Machine on Azure (Classic Deployment)
- The database user must have permissions at the database and schema level according to the following tables. The database user is used in the data export connection string.

  Database permissions required.

| | |
|---|---|
| Permission type code | Permission name |
| CRTB | CREATE TABLE |
| CRTY | CREATE TYPE |

| | |
|---|---|
| CRVW | CREATE VIEW |
| CRPR | CREATE PROCEDURE |
| ALUS | ALTER ANY USER |
| VWDS | VIEW DATABASE STATE |

Schema permissions required.

| | |
|---|---|
| Permission type code | Permission name |
| AL | ALTER |
| IN | INSERT |
| DL | DELETE |
| SL | SELECT |
| UP | UPDATE |
| EX | EXECUTE |
| RF | REFERENCES |

**Azure Key Vault service**

- Customer owned Key Vault subscription, which is used to securely maintain the database connection string.
- Grant PermissionsToSecrets permission to the application with the id "b861dbcc-a7ef-4219-a005-0e4de4ea7dcf." This can be completed by running the AzurePowerShell command below and is used to access the Key Vault that contains the connection string secret. More information: How to set up Azure Key Vault
- The Key Vault should be tagged with the Dynamics 365 organization (OrgId) and tenant ids (TenantId). This can be completed by running the AzurePowerShell command below. More information: How to set up Azure Key Vault

**Dynamics 365 (online)**

- A Dynamics 365 (online), version 9.0 or later version instance.
- The Data Export Service solution must be installed. Get it now from Microsoft AppSource.
- The entities that will be added to the Export Profile must be enabled with change tracking. To ensure a standard or custom entity can be synchronized go to **Customization** > **Customize the System**, and then click the entity. On the **General** tab make sure the **Change Tracking** option under the **Data Services** section is enabled.
- You must have the System Administrator security role in the instance of Dynamics 365 (online).

**Web browser**

Enable pop-ups for the domain https://discovery.crmreplication.azure.net/ in your web browser. This is required for auto-sign in when you navigate to Settings > Data Export.

## Services, credentials, and privileges required

To use the Data Export Service feature, you must have the following services, credentials, and privileges.

- A Dynamics 365 (online) subscription. Only users that are assigned the Dynamics 365 System Administrator security role can set up or make changes to an Export Profile.
- Azure subscription that includes the following services.
  - Azure SQL Database or AzureSQL Server on Azure virtual machines.
  - Azure Key Vault.

> **IMPORTANT**
> To use the Data Export Service the Dynamics 365 (online) and Azure Key Vault services must operate under the same tenant and within the same Azure Active Directory. More information: Azure integration with Office 365
>
> The Azure SQL Database service can be in the same or a different tenant from the Dynamics 365 (online) service.

## What you should know before using the Data Export Service

- Export Profiles must be deleted and then re-created whenever you perform any of the following actions on a Dynamics 365 (online) instance.
  - Restore an instance.
  - Copy (either full or minimal) an instance.
  - Reset an instance.
  - Move an instance to a different country or region.

  To do this, delete the Export Profile in the EXPORT PROFILES view, then delete the tables and stored procedures, and then create a new profile. More information: How to delete all Data Export Profile tables and stored procedures
- The Data Export Service doesn't work for Dynamics 365 (online) sandbox instances that are configured with **Enable administration mode** turned on. More information: Administration mode
- The Data Export Service does not drop (delete) the associated tables, columns, or stored procedure objects in the destination Azure SQL database when the following actions occur.
  - An entity is deleted in Dynamics 365 (online).
  - A field is deleted in Dynamics 365 (online).
  - An entity is removed from an Export Profile.

    These items must be dropped manually. How to delete Data Export Profile tables and stored procedures for a specific entity Metadata delete notifications are logged in the unprocessablemessages folder. Error handling and monitoring

## Export Profile

To export data from Dynamics 365 (online), the Dynamics 365 (online) administrator creates an Export Profile. Multiple profiles can be created and activated to synchronize data to different destination databases simultaneously.

The Export Profile is the core concept of the Data Export Service. The Export Profile gathers set up and configuration information to synchronize data with the destination database. As part of the Export Profile, the administrator provides a list of entities to be exported to the destination database. Once activated, the Export Profile starts the automatic synchronization of data. Initially, all data that corresponds to each selected entity is exported. Thereafter, only the changes to data as they occur to the entity records or metadata in Dynamics 365 (online) are synchronized continuously using a push mechanism in near real time. Therefore, you don't need to set up a schedule to retrieve data from Dynamics 365 (online).

Only entities that have change tracking enabled can be added to the Export Profile. Notice that, most of the standard Dynamics 365 entities which capture data are change tracking enabled. Custom entities must be explicitly enabled for change tracking before you can add them to an Export Profile. More information: Enable change tracking to control data synchronization

The Data Export Service does both metadata and data synchronization. Each entity translates into one table, and each field translates into a column in the destination database table. Table and column names use the schema name of the Dynamics 365 metadata.

Once activated, an Export Profile gathers statistics for data synchronization that helps in operational visibility and diagnostics of the data exported.

**Data synchronization available with an Export Profile**

| | | |
|---|---|---|
| Category | Feature | Supported data types |
| Initial Sync | Metadata - Basic Data Types | Whole Number, Floating Point Number, Decimal Number, Single Line of Text, Multi Line of Text, Date and Time data types. |
| Initial Sync | Metadata - Advanced Data Types | Currency, PartyList, Option Set, Status, Status Reason, Lookup (including Customer and Regarding type lookup). PartyList is only available for export version 8.1 and above. |
| Initial Sync | Data - Basic Types | All basic data types. |
| Initial Sync | Data - Advanced Types | All advanced data types. |
| Delta Sync | Modify Schema - Basic Types | Add or modify field change, all basic data types. |
| Delta Sync | Modify Schema - Advanced Types | Add or modify field change, all advanced data types. |
| Delta Sync | Modify Data - Basic Types | All basic data types. |
| Delta Sync | Modify Data - Advanced Types | All advanced data types, such as PartyList. |

# Create an Export Profile

Ensure that following requirements are met before creating an Export Profile.

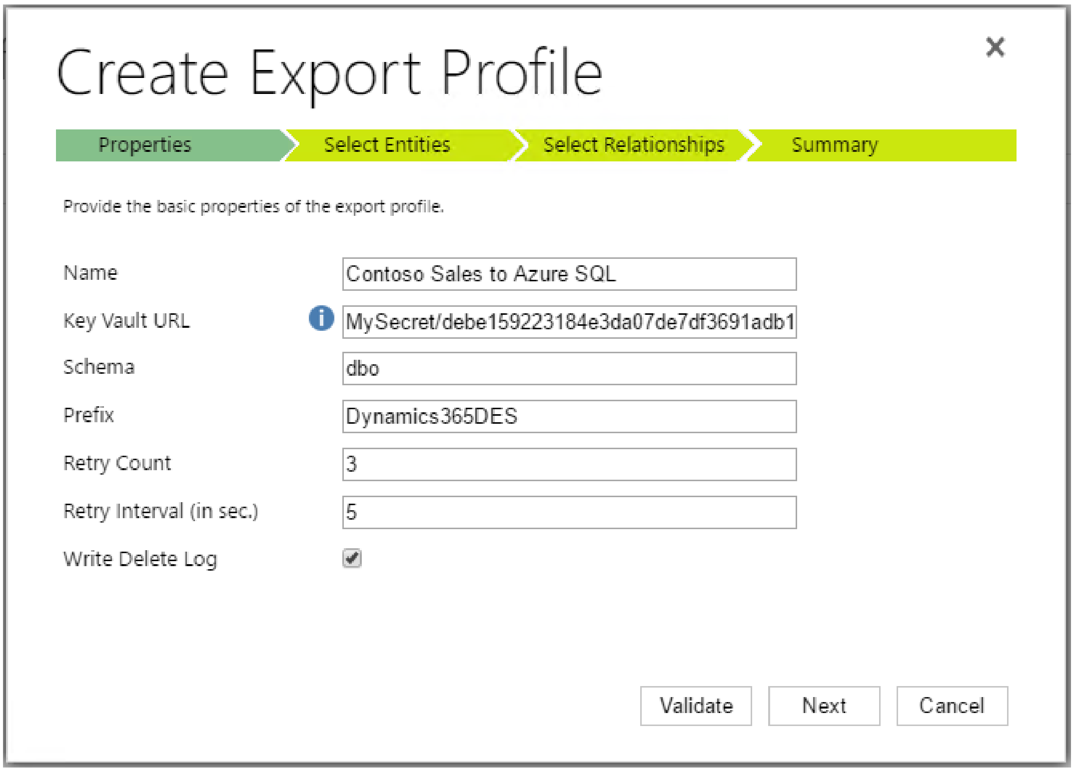
- The Data Export Service solution is installed in your Dynamics 365 (online) instance.

- Maintain the SQL Database connection string in the Key Vault and copy the Key Vault URL to provide in the Export Profile. More information: Azure: Get started with Azure Key Vault
- The entities to be added to the Export Profile are enabled for change tracking. More information: Enable change tracking to control data synchronization
- Your SQL Database service has enough storage space to store the Dynamics 365 data.
- You are a System Administrator in the Dynamics 365 (online) instance.

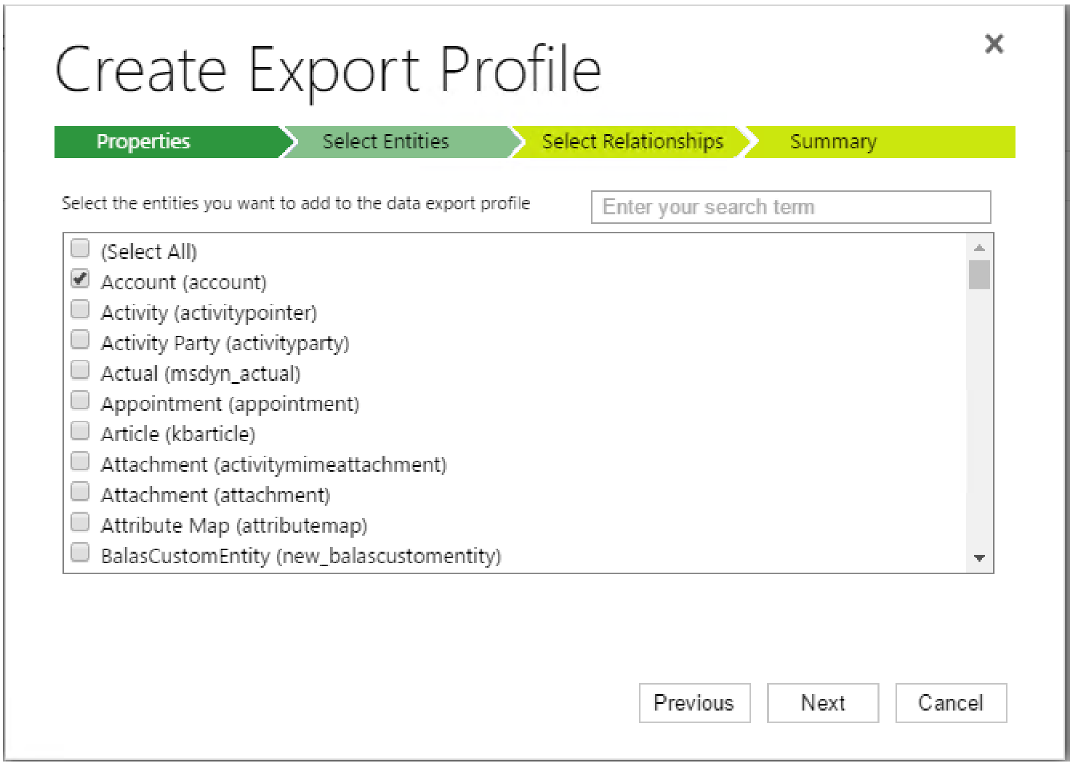
1. In Dynamics 365 (online), go to **Settings** > **Data Export**.
2. Review the notice, and click **Continue** or **Cancel** if you don't want to export data.
3. Click **New** to create a new Export Profile.
4. In the **Properties** step, enter the following information, and then click **Next** to continue without connecting to the Key Vault. Clicking **Validate** uses the Key Vault URL you provided to connect to the Key Vault.
   - **Name**. Unique name of the profile. This field is mandatory.
   - **Key Vault Connection URL**. Key Vault URL pointing to the connection string stored with credentials used to connect to the destination database. This field is mandatory. More information: How to set up Azure Key Vault

     > **IMPORTANT**
     > The Key Vault Connection URL is case-sensitive. Enter the Key Vault Connection URL exactly as it is displayed after you run the Windows PowerShell commands in this topic.

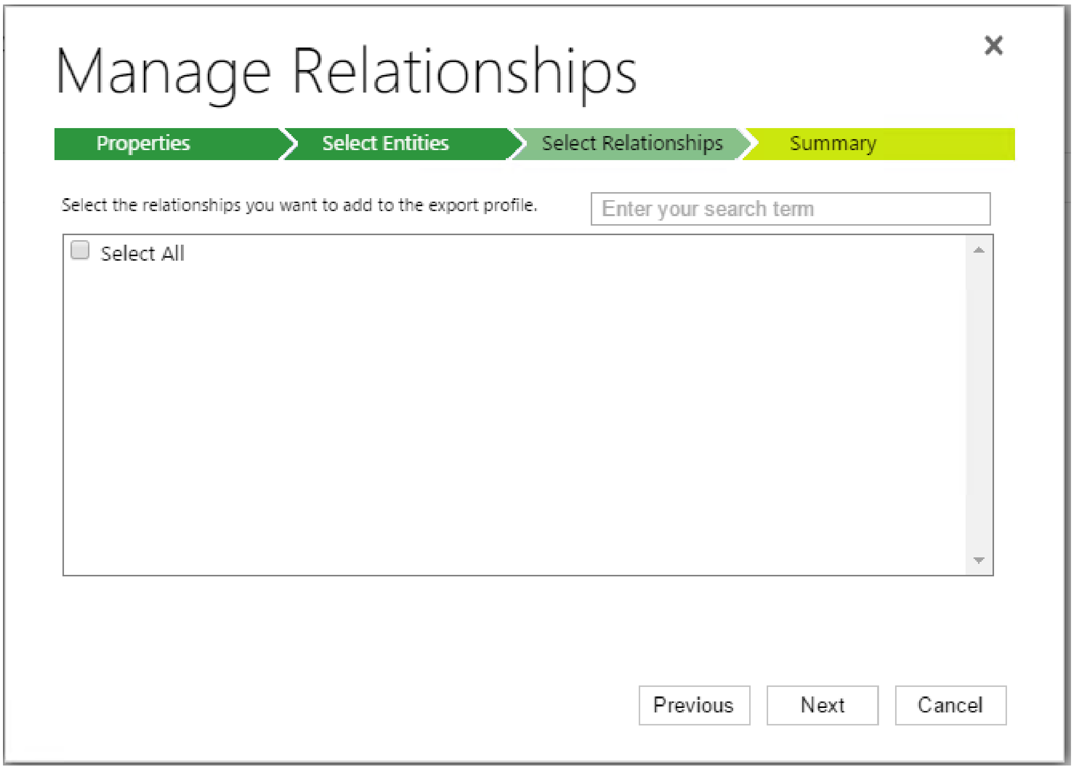
   - **Schema**. Name for an alternative database schema. Only alphanumeric characters are valid. This field is optional. By default, dbo is the schema that is used for the destination SQL Database.
   - **Prefix**. Prefix to be used for the table names created in the destination database. This helps you easily identify the tables created for the Export Profile in the destination database. When specified, make sure that the prefix is less than 15 characters. This field is optional and only alphanumeric characters are allowed.
   - **Retry count**. The number of times a record is retried in case of a failure to insert or update in the destination table. This field is mandatory. Acceptable values are 0-20 and the default is 12.
   - **Retry interval**. The number of seconds to wait before a retry in case of a failure. This field is mandatory. Acceptable values are 0-3600 and the default is 5.
   - **Write Delete Log**. Optional setting for logging deleted records.



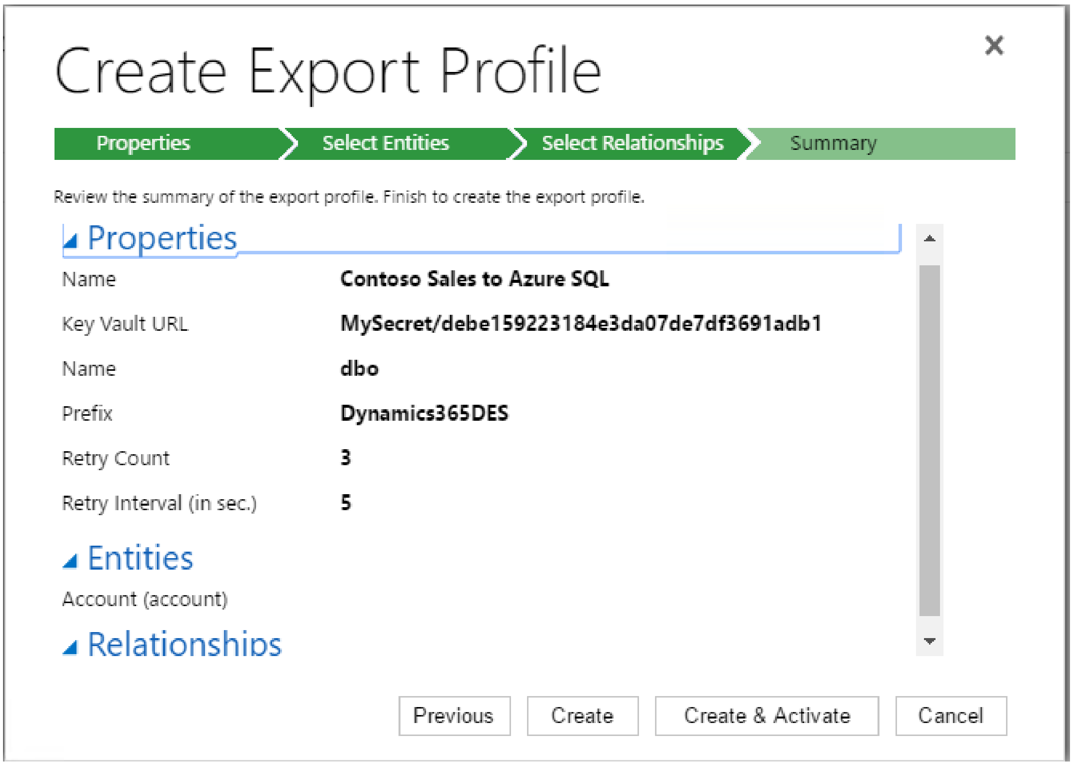

5. In the **Select Entities** step, select the entities that you want to export to the destination SQL Database, and then click **Next**.




6. In the **Select Relationships** step, you can synchronize the M:N (many-to-many) relationships that exist with the entities you selected in the previous step. Click **Next**.




7. In the **Summary** step, click **Create and Activate** to create the profile record and connect to the Key Vault, which begins the synchronization process. Otherwise, click **Create** to save the Export Profile and activate later.

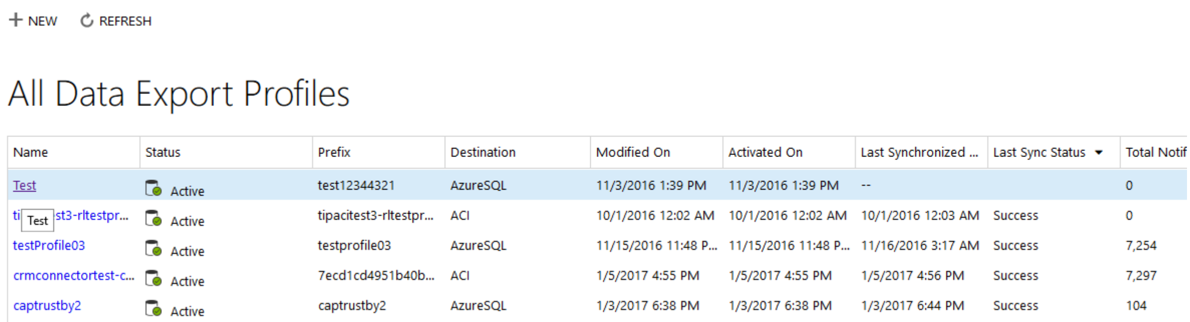



## Modify an existing Export Profile

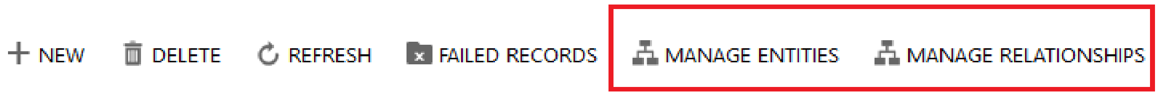
You can add or remove the entities and relationships in an existing Export Profile that you want to replicate.

1. In Dynamics 365 (online), go to **Settings** > **Data Export**.

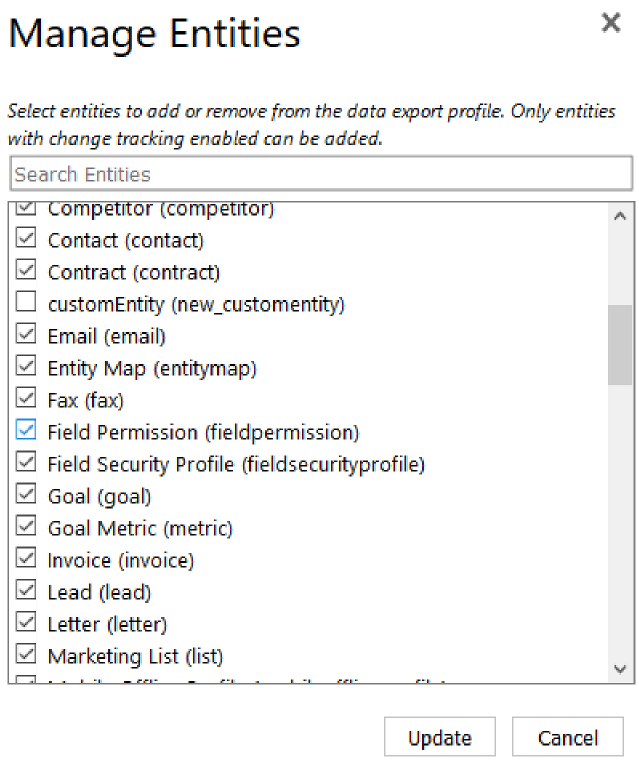
2. In the All Data Export Profile view, select the Export Profile that you want to change.




3. On the Actions toolbar, click **MANAGE ENTITIES** to add or remove entities for data export. To add or remove entity relationships, click **MANAGE RELATIONSHIPS**.




4. Select the entities or entity relationships that you want to add or remove.




5. Click **Update** to submit your changes to the Export Profile.

**IMPORTANT**

When you remove an entity or entity relationship from an Export Profile it doesn't drop the corresponding table in the destination database. Before you can re-add an entity that has been removed, you must drop the corresponding table in the destination database. To drop an entity table, see How to delete Data Export Profile tables and stored procedures for a specific entity.

## Table details for the destination Azure SQL Database

The Data Export Service creates tables for both data and metadata. A table is created for each entity and M:N relationship that is synchronized.

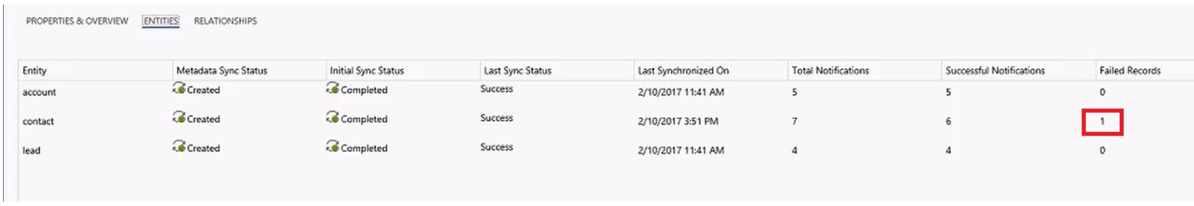
Once an Export Profile is activated, these tables are created in the destination database. These are system tables and will not have the SinkCreatedTime and SinkModifiedTime fields added.

| TABLE NAME | CREATED |
|---|---|
| <Prefix>_GlobalOptionsetMetadata | Upon Export Profile activation. |
| <Prefix>_OptionsetMetadata | Upon Export Profile activation. |
| <Prefix>_StateMetadata | Upon Export Profile activation. |
| <Prefix>_StatusMetadata | Upon Export Profile activation. |
| <Prefix>_TargetMetadata | Upon Export Profile activation. |
| <Prefix>_AttributeMetadata | Upon Export Profile activation. |
| <Prefix>_DeleteLog | Upon Export Profile activation when the delete log option is enabled. |

# Resolving synchronization issues

Even after several retry attempts, record synchronization failures may occur from database storage constraints or table locking due to long running queries. To resolve these failures you can force a resynchronization of only failed records or a resynchronization of all records.

1. View your export profiles to look for any that have record synchronization failures. You do this by viewing the data profiles in the Synchronization area or by opening a Export Profile , such as this profile that has a contact entity record synchronization failure.




2. Examine the source of the synchronization failure and resolve it. More information: Error handling and monitoring

3. After the problem has been resolved, resynchronize the failed records.

> **NOTE**
>
> Failed records synchronization is a public preview feature.
>
> - A preview feature is a feature that is not complete, but is made available before it’s officially in a release so customers can get early access and provide feedback. Preview features aren’t meant for production use and may have limited or restricted functionality.
>     - We expect changes to this feature, so you shouldn’t use it in production. Use it only in test and development environments.
>     - Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won’t be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

a. Sign in to your Dynamics 365 (online) instance and go to **Settings** > **Data Export**.

b. Open the Export Profile that includes record synch failures.

c. On the Export Profile toolbar, click **RESYNC FAILED RECORDS**.

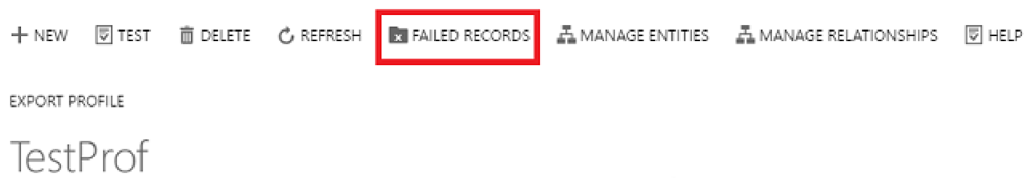
d. Click **Ok** upon successful resynchronization of the failed records on the confirmation dialog.


e. Verify that the Export Profile doesn't contain failed record notifications by opening the data export profile and viewing the **Failed Notifications** counter on the **PROPERTIES & OVERVIEW** tab, which should be **0**. Click **REFRESH** on the Export Profile toolbar to make sure the **Failed Notifications** value is current.


4. If the record synchronization failures persist after you've tried resynchronizing by following the previous steps, contact Microsoft Customer Support Services.

# Error handling and monitoring

To view the synchronization status of an Export Profile, go to **Settings** > **Data Export** and open the Export Profile. On the **ENTITIES** tab, the synchronization status is displayed including a **Failed Records** column for records that could not be synchronized. For any failed records, a list of those records including the status reason can be downloaded by clicking **FAILED RECORDS** on the command bar.

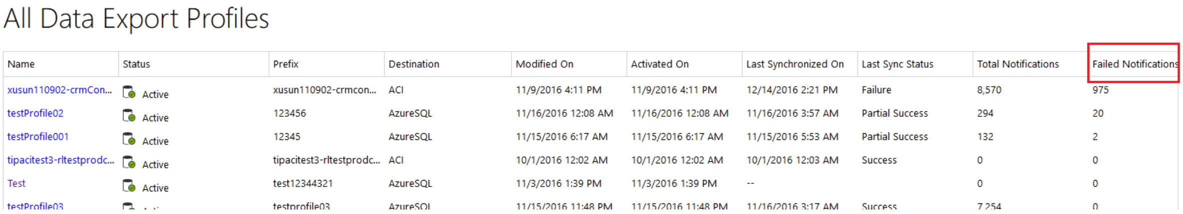



In the Export Profile you can click **PROPERTIES & OVERVIEW** to display the properties of the profile. Click **RELATIONSHIPS** to view the relationships synchronization status.

### How to view detailed information about the records that failed to sync

Viewing the failed record logs can help you determine the cause of synchronization failures. To view failed records in the destination Azure destination database, use Azure Storage Explorer, a free standalone app that allows you to easily work with Azure Storage data. More information: [Azure Storage Explorer](#).

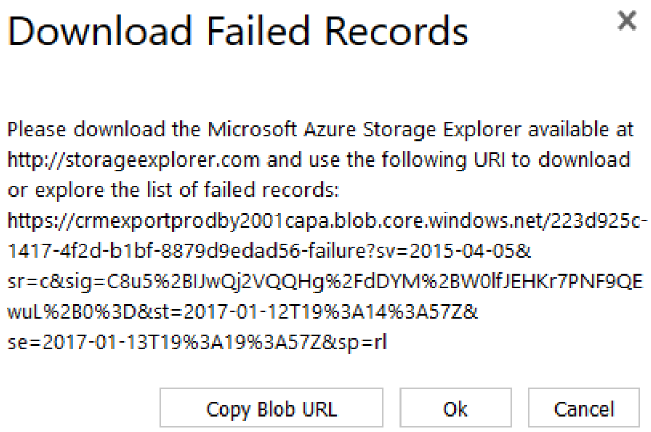
1. In Dynamics 365, go to **Settings** > **Data Export**.
2. In the In the All Data Export Profile view, select the Export Profile that has failed notifications.


All Data Export Profiles

| Name | Status | Prefix | Destination | Modified On | Activated On | Last Synchronized On | Last Sync Status | Total Notifications | Failed Notifications |
|---|---|---|---|---|---|---|---|---|---|
| xusun110902-crmCon... | Active | xusun110902-crmcon... | ACI | 11/9/2016 4:11 PM | 11/9/2016 4:11 PM | 12/14/2016 2:21 PM | Failure | 8,570 | 975 |
| testProfile02 | Active | 123456 | AzureSQL | 11/16/2016 12:08 AM | 11/16/2016 12:08 AM | 11/16/2016 3:57 AM | Partial Success | 294 | 20 |
| testProfile001 | Active | 12345 | AzureSQL | 11/15/2016 6:17 AM | 11/15/2016 6:17 AM | 11/15/2016 5:53 AM | Partial Success | 132 | 2 |
| tipacitest3-rltestprodc... | Active | tipacitest3-rltestprodc... | ACI | 10/1/2016 12:02 AM | 10/1/2016 12:02 AM | 10/1/2016 12:03 AM | Success | 0 | 0 |
| Test | Active | test12344321 | AzureSQL | 11/3/2016 1:39 PM | 11/3/2016 1:39 PM | -- | | 0 | 0 |
| testProfile03 | [illegible] | testprofile03 | AzureSQL | 11/15/2016 11:48 PM | 11/15/2016 11:48 PM | 11/16/2016 3:17 AM | Success | 7,254 | 0 |

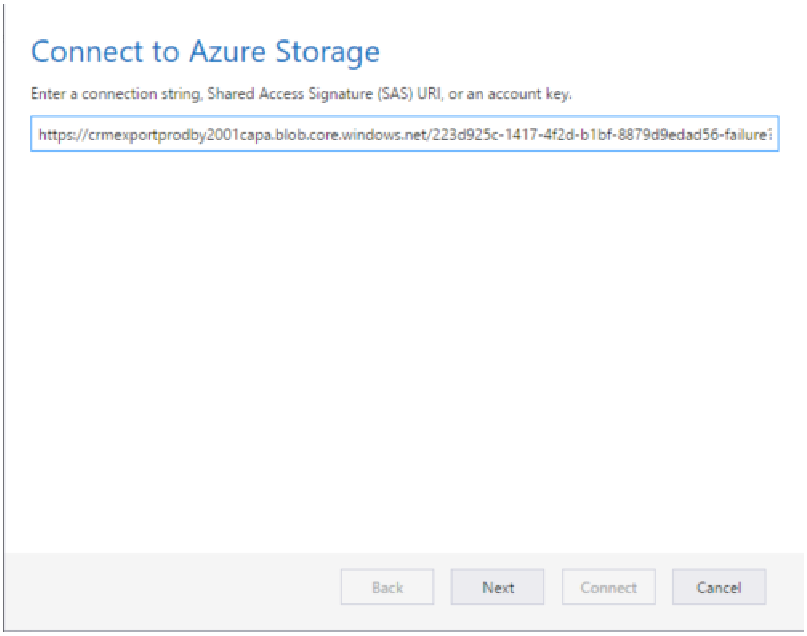
3. On the Actions toolbar, click **FAILED RECORDS**.


4. In the Download Failed Records dialog box, click **Copy Blob URL**, and then click **Ok**.




> **NOTE**
>
> The blob URL is valid for up to 24 hours. If the URL exceeds the 24 hour period, repeat the steps described earlier to generate a new blob URL.

5. Start Azure Storage Explorer.
6. In Azure Storage Explorer, click **Connect to Azure Storage**.
7. Paste the URL from your clipboard in to the **Connect to Azure Storage** box, and then click **Next**.




8. On the Connection Summary page, click **Connect**.

9. Azure Storage Explorer connects to the destination database. If failed records exist for the Export Profile, Azure Storage Explorer displays failed record synchronization folders.

#### Failed record synchronization folder structure and log files

The Failed Records Azure Blob storage URL points to a location that has the following folder structure:

- **data**. This folder contains failed data notifications and the associated JSON for record data.

- **metadata**. This folder contains failed metadata notifications and the associated JSON for metadata.

- **failurelog**. This folder contains logs that provides information about the synchronization failure and the reason the failure occurred.

- **forcerefreshfailurelog**. This folder contains errors from the last run of the Data Export Service Failed Records command used to resynchronize failed records.

- **unprocessablemessages**. This folder contains the data notifications that were not processed either due to deletion of data or metadata and the associated JSON.

  The failurelog and forcerefreshfailurelog folders are structured *Year**Month**Day**Hour* so that you can quickly locate the latest failures. All failure records older than 30 days are deleted.

  Here's an example log file that indicates a contact entity record synchronization failure.

```
Entity: contact, RecordId: 459d1d3e-7cc8-e611-80f7-5065f38bf1c1, NotificationTime: 12/28/2016 12:32:39 AM,
ChangeType: Update, FailureReason: The database 'tempdb' has reached its size quota. Partition or delete data,
drop indexes, or consult the documentation for possible resolutions.
The statement has been terminated.
```

#### Common reasons for record synchronization failures

Here are a few reasons why record synchronization failures may occur.

- Insufficient storage for the destination database. Before you try to resynchronize the failed records, increase or free Azure SQL Database storage as appropriate. When this problem occurs, a message similar to this is recorded to the failure log.

  The database 'databasename' has reached its size quota. Partition or delete data, drop indexes, or consult the documentation for possible resolutions.

- Synchronization timeouts with Azure SQL Database. This can occur during the initial synchronization of a data export profile when large amounts of data are processed at one time. When this issue occurs, resynchronize the failed records. Resolving synchronization issues

## Best practices when using Azure SQL Database with Data Export

- To avoid synchronization errors due to resource throttling, we recommend that you have an Azure SQL Database Premium P1 or better plan when you use the Data Export Service. More information: Azure SQL Database resource limits and SQL Database Pricing
- Set the Azure SQL Database to use read committed snapshot isolation (RCSI) for workloads running concurrently on the destination database that execute long running read queries, such as reporting and ETL jobs. This reduces the occurrence of timeout errors that can occur with the Data Export Service due to read\write conflicts.
- To help improve query performance we recommend the Data Export Service database max degree of parallelism (MAXDOP) be set to 1. More information: MSDN: Server Memory Options
- Frequently assess the amount of fragmentation, and when necessary, rebuild the indexes in the Data Export Service database. More information: Reorganize and Rebuild Indexes
- Periodically update database statistics on tables and indexed views in the Data Export Service database. More information: Update Statistics
- Monitor the Data Export Service database's utilization. More information: Perf monitoring

## About data synchronization latency

The Data Export Service is architected to synchronize data changes to the destination database using a push mechanism by listening to changes as they happen in Dynamics 365. The service strives to push data within a few minutes, but there are number of factors that can influence end-to-end synchronization latency.

Factors that influence the duration of synchronization include the following:

- The current work load on Dynamics 365.
- The data change rate in Dynamics 365.
- The number of entities added to each export profile and their attributes.
- SQL Server performance. For example:
    - SQL connection setup time.
    - SQL statement execution time.

Based on our monitoring of the service it's been observed that most on-going delta synchronization finishes in 15 minutes when the service operates under the following conditions:

- The synchronization that occurs is a delta synchronization and not the initial synchronization. Delta synchronization is only for data change operations, which include record create, update, and delete transactions. Note that delta synchronization begins once the initial synchronization has finished.
- The maximum data change rate in Dynamics 365 for all the entities in the export profile is less than 3000 records per hour. Any sudden increase in the data change rate due to bulk change of records exceeding the maximum change rate will cause additional latency.
- Each entity added to an export profile has less than 150 attributes.
- Database connection or SQL statement execution finishes in less than 10 seconds. If this limit is exceeded it will result in additional latency.
- No destination database connection or SQL execution errors occur during synchronization.

When the above conditions are met, 15 minutes is a typical synchronization latency. Microsoft provides no service level agreement (SLA) for the Data Export Service and makes no guarantees or commitments regarding synchronization latency times.

## How to set up Azure Key Vault

Run the Windows PowerShell script described here as an Azure account administrator to give permission to the Data Export Service feature so it may access your Azure Key Vault. This script displays the key vault URL required for creating the Export Profile that is used to access the connection string.

Before running the script, replace the placeholders for the following variables.

- $subscriptionId. The Key Vault resource group you want to use. If a resource group doesn’t already exist a new one with the name you specify will be created. In this example, *ContosoResourceGroup1* is used.
- $location. Specify the location where the resource group is, or should be, located, such as *West US*.
- $connectionString. The connection string to the Azure SQL Database. You can use the ADO.NET connection string as it is displayed in your Azure dashboard.
- $organizationIdList = Comma separated list of allowed Dynamics 365 organizations, listed by organization Id (organizationId), to enable for Data Export Service. To find an organization's Id, in Dynamics 365 go to **Settings** > **Customizations** > **Developer Resources**. The organization Id is under **Instance Reference Information**.
- $tenantId. Specifies the Azure Active Directory tenant Id to which the Key Vault subscription.

> **IMPORTANT**
>
> An Azure subscription can have multiple Azure Active Directory tenant Ids. Make sure that you select the correct Azure Active Directory tenant Id that is associated with the instance of Dynamics 365 that you will use for data export.

```
# ----------------------------------------------------------------------------- #
 #  Provide the value for the following parameters before executing the script
$subscriptionId = 'ContosoSubscriptionId'
$keyvaultName = 'ContosoKeyVault'
 $secretName = 'ContosoDataExportSecret'
 $resourceGroupName = 'ContosoResourceGroup1'
 $location = 'West US'
 $connectionString = 'AzureSQLconnectionString'
$organizationIdList = 'ContosoSalesOrg1_id, ContosoSalesOrg2_id'
$tenantId = 'tenantId'
 # ----------------------------------------------------------------------------- #

# Login to Azure account, select subscription and tenant Id
Login-AzureRmAccount
Set-AzureRmContext -TenantId $tenantId -SubscriptionId $subscriptionId

# Create new resource group if not exists.
$rgAvail = Get-AzureRmResourceGroup -Name $resourceGroupName -Location $location -ErrorAction SilentlyContinue
if(!$rgAvail){
    New-AzureRmResourceGroup -Name $resourceGroupName -Location $location
}

# Create new key vault if not exists.
$kvAvail = Get-AzureRmKeyVault -VaultName $keyvaultName -ResourceGroupName $resourceGroupName -ErrorAction
SilentlyContinue
if(!$kvAvail){
    New-AzureRmKeyVault -VaultName $keyvaultName -ResourceGroupName $resourceGroupName -Location $location
    # Wait few seconds for DNS entry to propagate
    Start-Sleep -Seconds 15
}

# Create tags to store allowed set of Organizations.
$secretTags = @{}
foreach ($orgId in $organizationIdList.Split(',')) {
    $secretTags.Add($orgId.Trim(), $tenantId)
}

# Add or update a secret to key vault.
$secretValue = ConvertTo-SecureString $connectionString -AsPlainText -Force
$secret = Set-AzureKeyVaultSecret -VaultName $keyvaultName -Name $secretName -SecretValue $secretValue -Tags
$secretTags

# Authorize application to access key vault.
$servicePrincipal = 'b861dbcc-a7ef-4219-a005-0e4de4ea7dcf'
Set-AzureRmKeyVaultAccessPolicy -VaultName $keyvaultName -ServicePrincipalName $servicePrincipal -
PermissionsToSecrets get

# Display secret url.
Write-Host "Connection key vault URL is "$secret.id.TrimEnd($secret.Version)""
```

## How to delete all Data Export Profile tables and stored procedures

**IMPORTANT**

Before you run this SQL statement make sure that you have correctly defined the @prefix and @schema values in the statement. The Export Profile will need to be re-created after you run this SQL statement.

```
----------------------------------------------------------------
-- Provide the value for the following parameters
DECLARE @prefix nvarchar(32) =''
DECLARE @schema nvarchar(32) ='dbo'
----------------------------------------------------------------

DECLARE @sql nvarchar(max) = '';

SELECT @sql += 'DROP TABLE ' + QUOTENAME([TABLE_SCHEMA]) + '.' + QUOTENAME([TABLE_NAME]) + ';'
FROM [INFORMATION_SCHEMA].[TABLES]
WHERE [TABLE_TYPE] = 'BASE TABLE' AND [TABLE_NAME] like @prefix + '_%' AND [TABLE_SCHEMA]= @schema;

PRINT @sql
EXEC SP_EXECUTESQL @sql;

PRINT 'Finished dropping all tables. Starting to drop all stored procedures now.'

SELECT @sql='';
SELECT @sql += 'DROP PROCEDURE ' + QUOTENAME([ROUTINE_SCHEMA]) + '.' + QUOTENAME([ROUTINE_NAME]) + ';'
FROM [INFORMATION_SCHEMA].[ROUTINES]
WHERE [ROUTINE_TYPE] = 'PROCEDURE' AND [ROUTINE_NAME] like @prefix + '_%' AND [ROUTINE_SCHEMA]= @schema;
PRINT @sql
EXEC SP_EXECUTESQL @sql;

PRINT 'Finished dropping all stored procedures. Starting to drop all types now.'

SELECT @sql='';
SELECT @sql += 'DROP TYPE ' + QUOTENAME(SCHEMA_NAME([SCHEMA_ID])) + '.' +  QUOTENAME([NAME]) + ';'
FROM SYS.TYPES
WHERE is_user_defined = 1 AND [NAME] LIKE @prefix + '_%' AND [SCHEMA_ID]=SCHEMA_ID(@schema);

PRINT @sql
EXEC SP_EXECUTESQL @sql;
```

## How to delete Data Export Profile tables and stored procedures for a specific entity

> **IMPORTANT**
>
> Before you run this SQL statement make sure that you have correctly defined the @prefix, @schema, and @entityName values in the statement. In this example, the leads entity table, types, and stored procedures are dropped.

```
-----------------------------------------------------------------
-- Provide the value for the following parameters
DECLARE @prefix nvarchar(32) ='crm'
DECLARE @schema nvarchar(32) ='dbo'
DECLARE @entityName nvarchar(32) ='lead'
-----------------------------------------------------------------
DECLARE @sql nvarchar(max) = '';

IF @prefix != ''
BEGIN
       SET @prefix = @prefix + '_'
END

SELECT @sql += 'DROP TABLE ' + QUOTENAME([TABLE_SCHEMA]) + '.' + QUOTENAME([TABLE_NAME]) + ';'
FROM [INFORMATION_SCHEMA].[TABLES]
WHERE [TABLE_TYPE] = 'BASE TABLE' AND [TABLE_NAME] like @prefix + @entityName  AND [TABLE_SCHEMA]= @schema;
PRINT @sql
EXEC SP_EXECUTESQL @sql;
PRINT 'Finished dropping the entity. Starting to drop the types associated with the entity'

SELECT @sql='';
SELECT @sql += 'DROP TYPE ' + QUOTENAME(SCHEMA_NAME([SCHEMA_ID])) + '.' + QUOTENAME([NAME]) + ';'
FROM SYS.TYPES
WHERE is_user_defined = 1 AND [NAME] LIKE @prefix + @entityName +'Type'
OR [NAME] LIKE @prefix + @entityName +'IdType'
AND [SCHEMA_ID]=SCHEMA_ID(@schema);
PRINT @sql
EXEC SP_EXECUTESQL @sql;
```

## Find the Azure Active Directory tenant Id for your Dynamics 365 instances

1. Sign in to the Azure portal.
2. Go to **Azure Active Directory** > **App registrations** > **Endpoints**.
3. The tenant id is displayed in the endpoint URLs listed with the Azure subscription.

## Azure SQL database static IP addresses used by the Data Export Service

In Azure SQL Database, click **Set server firewall**, turn **Allow access to Azure services** to **OFF**, click **Add client IP**, and then add the IP addresses appropriate for the region of your Azure SQL Database. More information: Azure: Configure an Azure SQL Database server-level firewall rule using the Azure Portal

| REGION | IP ADDRESS |
|---|---|
| West US | 40.112.139.218 |
| East US | 23.96.92.86 |
| West Europe | 40.68.252.224 |
| East Asia | 52.175.24.148 |
| Southeast Asia | 52.163.231.218 |
| Central India | 52.172.191.195 |

| REGION | IP ADDRESS |
|---|---|
| South India | 52.172.51.15 |
| North Europe | 52.169.117.212 |
| Japan West | 138.91.22.196 |
| Japan East | 13.73.7.177 |
| Brazil South | 191.235.81.249 |
| Australia Southeast | 40.115.78.163 |
| Australia East | 13.73.202.160 |
| Canada Central | 52.228.26.31 |
| Canada East | 40.86.251.81 |
| United Kingdom South | 51.140.71.166 |
| United Kingdom West | 51.141.44.218 |

# Known issues

**Deleted records may get reinserted into entity table after a synchronization failure**

When you recover from synchronization failures, records that had been previously deleted may get reinserted back into the originating entity table. To work around this issue when synchronization failures occur, follow these steps.

1. Create Export Profiles that are Write Delete Log enabled. Re-create existing Export Profiles that don't have Write Delete Log enabled.

2. Create and execute a SQL query for the Azure SQL destination database that searches for records in the DeleteLog table. If one or more records are found it indicates the presence of deleted records.

3. If one or more records exist in the DeleteLog table, create and run a SQL query that detects instances where the record Id for a record found in the DeleteLog table matches the record Id for a record in an *EntityName* table and the versionNumber in the deleteLog is greater than the versionNumber on the record in the *EntityName* table. When a record Id match occurs, delete the record from the *EntityName* table. For example, if a record Id in the AccountId column of the DeleteLog table matches a record Id in the AccountId column of the AccountBase entity table and the versionNumber in the DeleteLog is greater than the versionNumber in the Account table, delete the record from the AccountBase entity table.

   **IMPORTANT**

   Depending on your business needs and requirements, we recommend that you execute the SQL queries for record deletion frequently, but during non-operational hours.

   Example query for entity record deletion.

```
DELETE FROM [dbo].[prefix_account] A
WHERE id IN (SELECT CONVERT(uniqueidentifier, recordid) FROM [dbo].[prefix_DeleteLog] DL WHERE DL.entityname
='account'
AND DL.VersionNumber &gt; A.VersionNumber)
```

**Entities that don't support data export**

The entities listed here, although they support change tracking, aren't supported for data export using the Data Export Service.

| ENTITY | TABLE NAME | WORK AROUND |
|---|---|---|
| Activity | ActivityPointerBase | Select the specific activity entities for export, such as Phone Call, Appointment, Email, and Task. |

# Privacy notice

By using the Data Export Service, when you activate a data export profile from within Dynamics 365, the data of the entities added to the profile is sent to Azure. The initial synchronization includes all the data associated with the entities added to the export profile, but thereafter synchronization includes only new changes, which are continuously sent to the Data Export Service. Data sent to the Data Export Service is stored temporarily in Azure Service Bus and Azure Storage, processed in Azure Service Fabric, and finally synchronized (inserted, updated, or deleted) to the destination database specified in your Azure subscription. After the data has been synchronized, it is deleted from Azure Service Bus and Azure Storage. If there is a failure during data synchronization, minimal data corresponding to entity type, record ID, and sync timestamp is stored in Azure Storage to allow for downloading a list of records that were not updated.

An administrator can deactivate the data export profile at any time to stop data synchronization. In addition, an administrator can delete the export profile to remove any failed record logs and can uninstall the Data Export Service solution to stop using the Data Export Service.

Data synchronization happens continuously between Dynamics 365 and the Data Export Service in a secure manner. Data is encrypted as it is continuously exchanged between Dynamics 365 and the Data Export Service.

Azure components and services that are involved with the Data Export Service are detailed in the following sections.

Microsoft Azure Trust Center

Azure Service Fabric

This provides the API and compute Azure VMs to process record synchronize notifications received from Dynamics 365 and then process them to insert, update, or delete record data in the destination database. Micro-services that are deployed on virtual machines managed by the Azure Service Fabric runtime handle all the compute services related to data synchronization.

Azure Service Bus

This provides the message bus into which Dynamics 365 inserts the synchronization notification messages that are processed by compute nodes in Azure Service Fabric. Each message stores information, such as the org id and record, for which for which to sync data.

Azure Blob Storage

Data is temporarily stored in Azure Blob Storage in case the record sync notification’s data is too large to store in a message or a transient failure is encountered to process the synchronization notification. These blobs are encrypted by leveraging the latest feature in the Azure Storage SDK, which provides symmetric and asymmetric encryption support and integration with Azure Key Vault.

Azure SQL

The Azure SQL Database stores data export profile configuration and data synchronization metrics.

**See also**

AppSource: Dynamics 365 - Data Export Service
What's new with Microsoft Dynamics 365 – Data Export Service? Manage your data
Data Export Service Team Blog: Introduction to Dynamics 365 – Data Export Service

# What's new with the Data Export Service?

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This topic lists the new features that are available for the Data Export Service.

## March 2017

**Resynchronize records that failed to synchronize**

With this new preview feature you can recover from synchronization failures with on-demand resynchronization.


More information: Resolving synchronization issues

**See also**

Replicate Dynamics 365 (online) data to Azure SQL Database
Set up and manage phones and tablets

# Move configuration data across instances and organizations with the Configuration Migration tool

9/27/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The Configuration Migration tool enables you to move configuration data across Dynamics 365 instances and organizations. Configuration data is used to define custom functionality in Dynamics 365, and is typically stored in custom entities. Configuration data is different from end user data (account, contacts, and so on). A typical example of configuration data is what you define in Unified Service Desk for Dynamics 365 to configure a customized call center agent application. The Unified Service Desk entities, along with the configuration data that is stored in the entities, define an agent application. For more information about Unified Service Desk, see Unified Service Desk Guide.

The Configuration Migration tool enables you to:

- Select the entities and fields from where you want to export the configuration data.
- Avoid duplicate records on the target system by defining a uniqueness condition for each entity based on a combination of fields in the entity, which is used to compare against the values on the target system. If there are no matching values, a unique record is created on the target system. If a matching record is found, the record is updated on the target system.

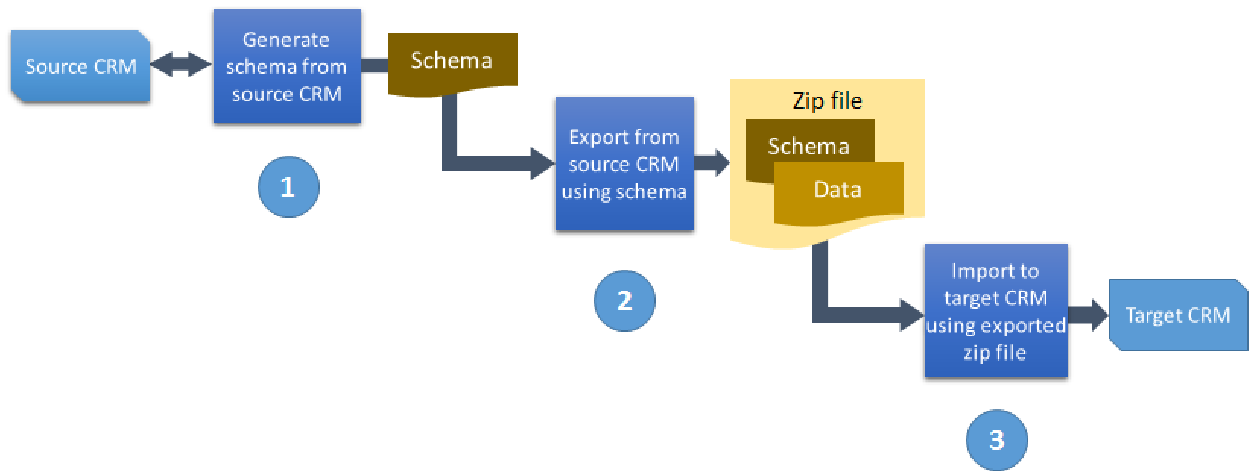
> **NOTE**
>
> If no duplicate detection (uniqueness) condition is specified for an entity that is being exported, the tool uses the primary field name of the entity to compare against the existing data on the target system.

- Disable plug-ins before exporting data and then re-enable them on the target system after the import is complete for all the entities or selected entities.
- Validate the schema for the selected entities to be exported to ensure that all the required data/information is present.
- Reuse an existing schema to export data from a source system.
- Automatically move DateTime fields forward at import for demo environments.
- Embed the exported modules created from this tool (schema and data files) in other programs. For example, you can use the exported data in Dynamics 365 Package Deployer along with other solutions files and data to create and deploy packages on a Dynamics 365 instance. More information: Deploy packages using Dynamics 365 Package Deployer and Windows PowerShell

> **IMPORTANT**
>
> The Configuration Migration tool does not support filtering of records in an entity. By default, all the records in the selected entity will be exported.

## How does the Configuration Migration tool work?

The following diagram illustrates how the Configuration Migration tool is used for migrating configuration data.




1 **Define the schema of the source data to be exported**: The schema file (.xml) contains information about the data that you want to export such as the entities, attributes, relationships, definition of uniqueness of the data, and whether the plug-ins should be disabled before exporting the data. More information: Create a schema to export configuration data

2 **Use the schema to export data**: Use the schema file to export the data into a .zip file that contains the data and the schema of the exported data. More information: Create a schema to export configuration data

3 **Import the exported data**: Use the exported data (.zip file) to import into the target Dynamics 365 instance. The data import is done in multiple passes to first import the foundation data while queuing up the dependent data, and then import the dependent data in the subsequent passes to handle any data dependencies or linkages. This ensures clean data import. More information: Import configuration data

# Troubleshoot configuration data migration issues using log files

The Configuration Migration tool provides logging support to get detailed information about errors that can occur while signing in to the Dynamics 365 instance using the tool, activities performed by the tool during the schema definition and export/import of the configuration data, and information about the data that was imported using the tool. There are three log files generated by the tool that are available at the following location on the computer where you run the tool:
c:\Users\<*UserName*>\AppData\Roaming\Microsoft\DataMigrationUtility\<*Version*>.

- **Login_ErrorLog.log**: Provides information about the issues that occurred when you use the tool to sign in to the Dynamics 365 instance. If there are any issues during sign in, a message appears on the tool's login screen with a link to this log file. The message states that an error occurred while processing the login request and the user can view the error log. You can click the link in the message to view this log file. The log file is created the first time you encounter any sign-in issues in the tool. Thereafter, the log file is used to log information about a sign-in issue, whenever it occurs.
- **DataMigrationUtility.log**: Provides detailed information about each task performed in the tool during last run. You can view the log file from the tool by clicking the **Logs** menu on the main screen, and clicking **Running Log**.
- **ImportDataDetail.log**: Provides detailed information about the data imported in the last import job by using the tool. Each time you run an import job using this tool, the existing details from the log file are moved to a file called ImportDataDetail._old.log in the same directory, and the ImportDataDetail.log file displays information about the latest import job run using the tool. You can view this log file from the tool by clicking the **Logs** menu on the main screen, and then clicking **Last Import Log**.

## Best practices for migrating your configuration data by using the tool

The following are things you should consider while using this tool to migrate your configuration data:

- While creating the export data schema, you must define uniqueness rules appropriately for each entity to avoid any unintentional data updates on the target system.
- Import the exported data in a pre-production environment (preferably a mirror image of the production environment) to ensure that the data import results are as you intended.
- Back up your production environment before importing the data.

**See also**

Create a schema to export configuration data
Modify a configuration data schema
Import configuration data
Manage product catalog configuration

# Create a schema to export configuration data

9/27/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

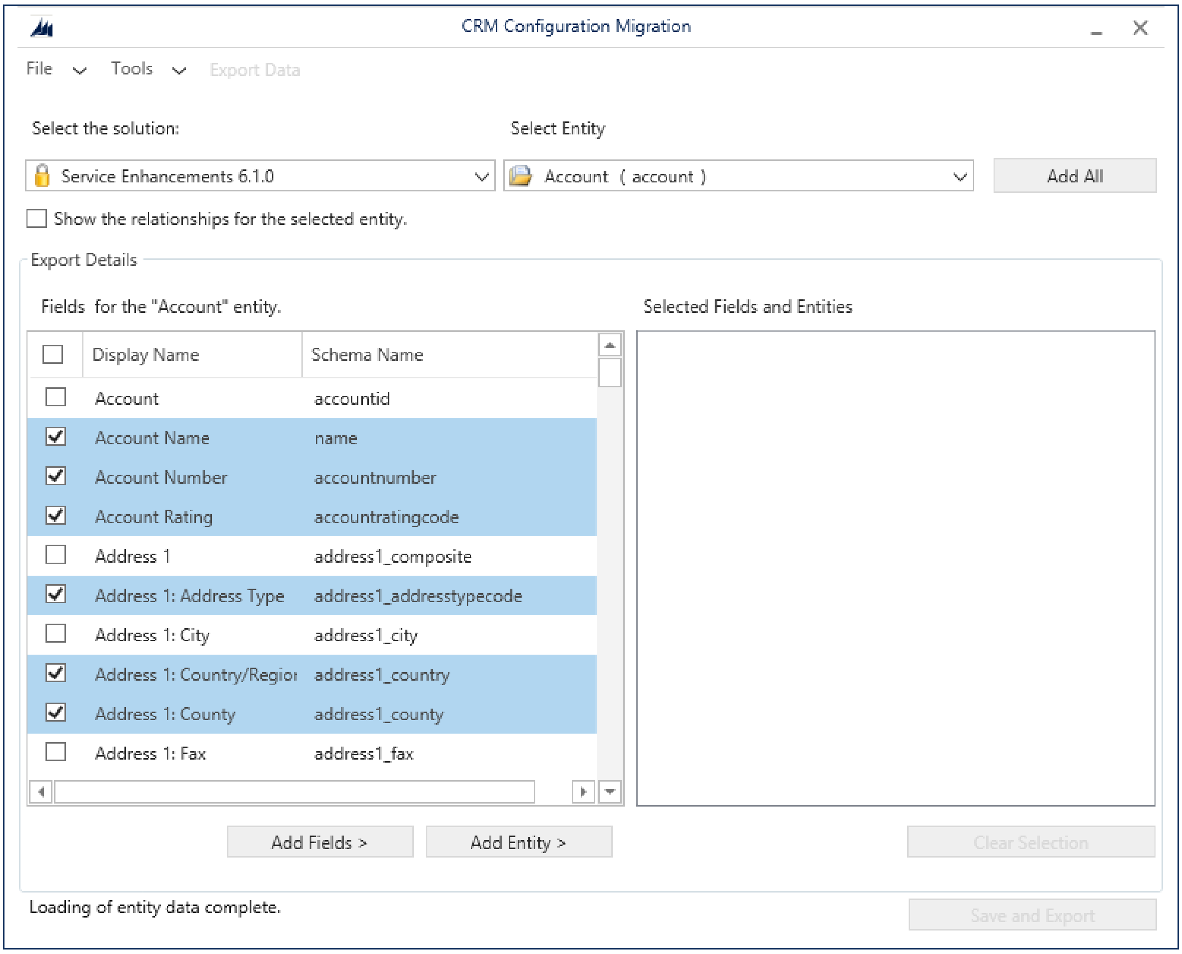
The Configuration Migration tool lets you build a schema to describe your export data. It also enables you to check for any missing dependencies and relationships in the entities or fields to be exported to avoid an inconsistent data set.

## Before you begin

Download the Configuration Migration Tool. The Configuration Migration tool is available as a NuGet package. To download the tool, see Download tools from NuGet. Follow the steps on this page to extract the **DataMigrationUtility.exe** tool.

## Create a schema and export configuration data

1. Start the Configuration Migration tool. Double-click **DataMigrationUtility.exe** in the folder: [your folder]\Tools\ConfigurationMigration\
2. On the main screen, click **Create schema**, and click **Continue**.
3. On the **Login** screen, provide authentication details to connect to your Dynamics 365 instance from where you want to export data. If you have multiple organizations on the Dynamics 365 server, and want to select the organization from where to export the data, select the **Always display list of available orgs** check box. Click **Login**.
4. If you have multiple organizations, and you selected the **Always display list of available orgs** check box, the next screen lets you choose the organization that you want to connect to. Select a Dynamics 365 organization to connect to.
5. From the **Select the solution** list, select a solution from where you want to export the data:
6. In the selected solution, you can select the entities and fields to be exported or export all the entities within the solution.
   a. To select the entities and fields to be exported, from the **Select Entity** list, select the entity for which you want to export the data. The **Fields for the entity** list displays all the fields of the selected entity.
      a. To add selected fields of the entity, click **Add Fields**.
      b. To add the entity itself and all the fields, click **Add Entity**.
   b. To export all the entities, click **Add All** next to the **Select Entity** list.

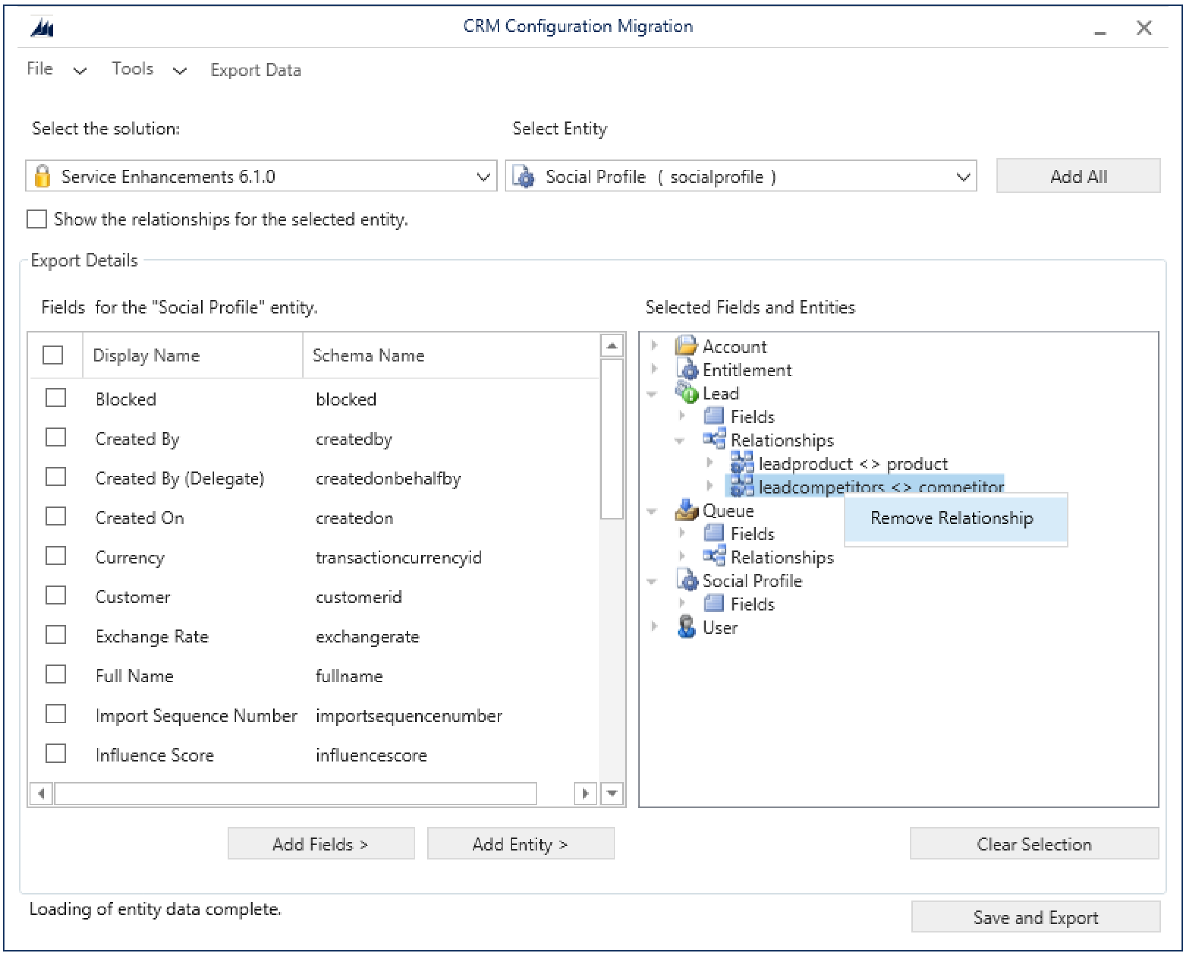



7. You can select the **Show the relationships of the selected entity** to view the related entities for the selected entity so that you can export them as well.

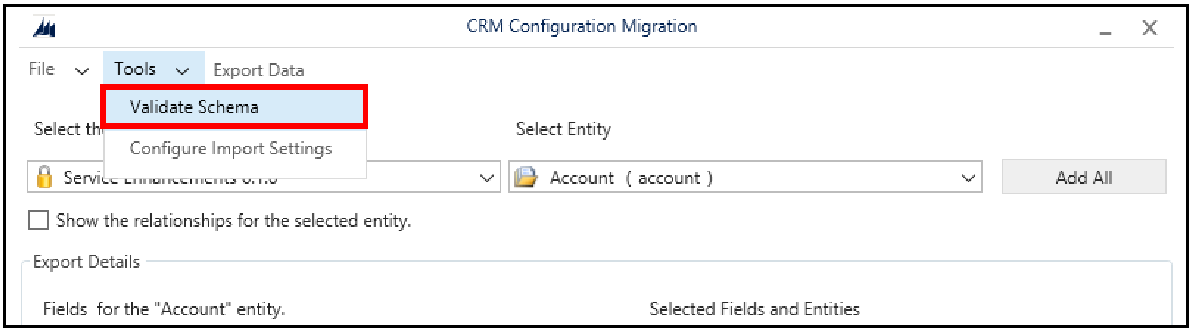
8. The selected entities are displayed in the **Selected Fields and Entities** box.

   - If you want to remove an entity, field, or relationship, click to select it, right-click, and then select the remove option.

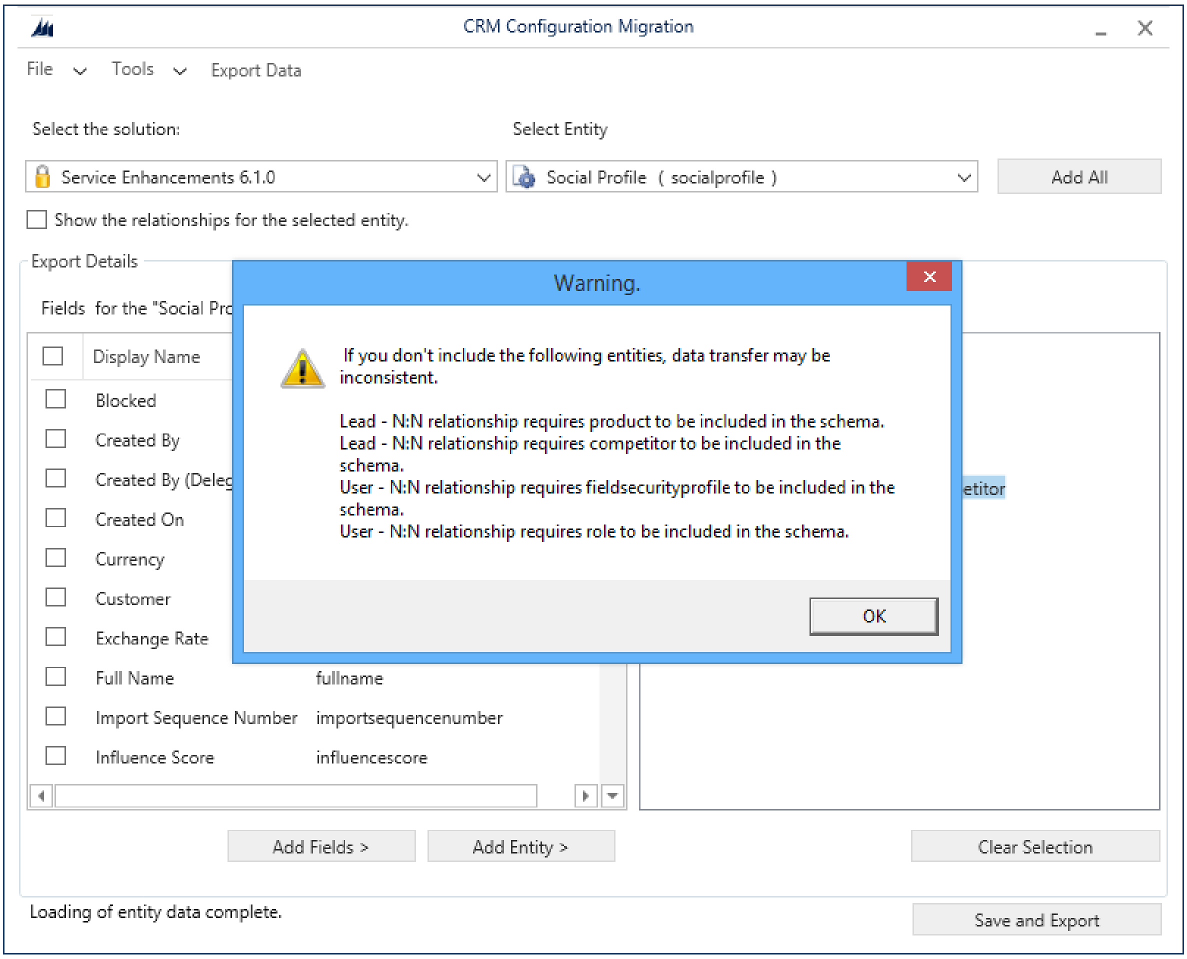
   - If you want to remove all the items in the **Selected Fields and Entities** and start over, click **Clear Selection**.




9. To validate the selected data to be exported, click **Tools** > **Validate Schema**.



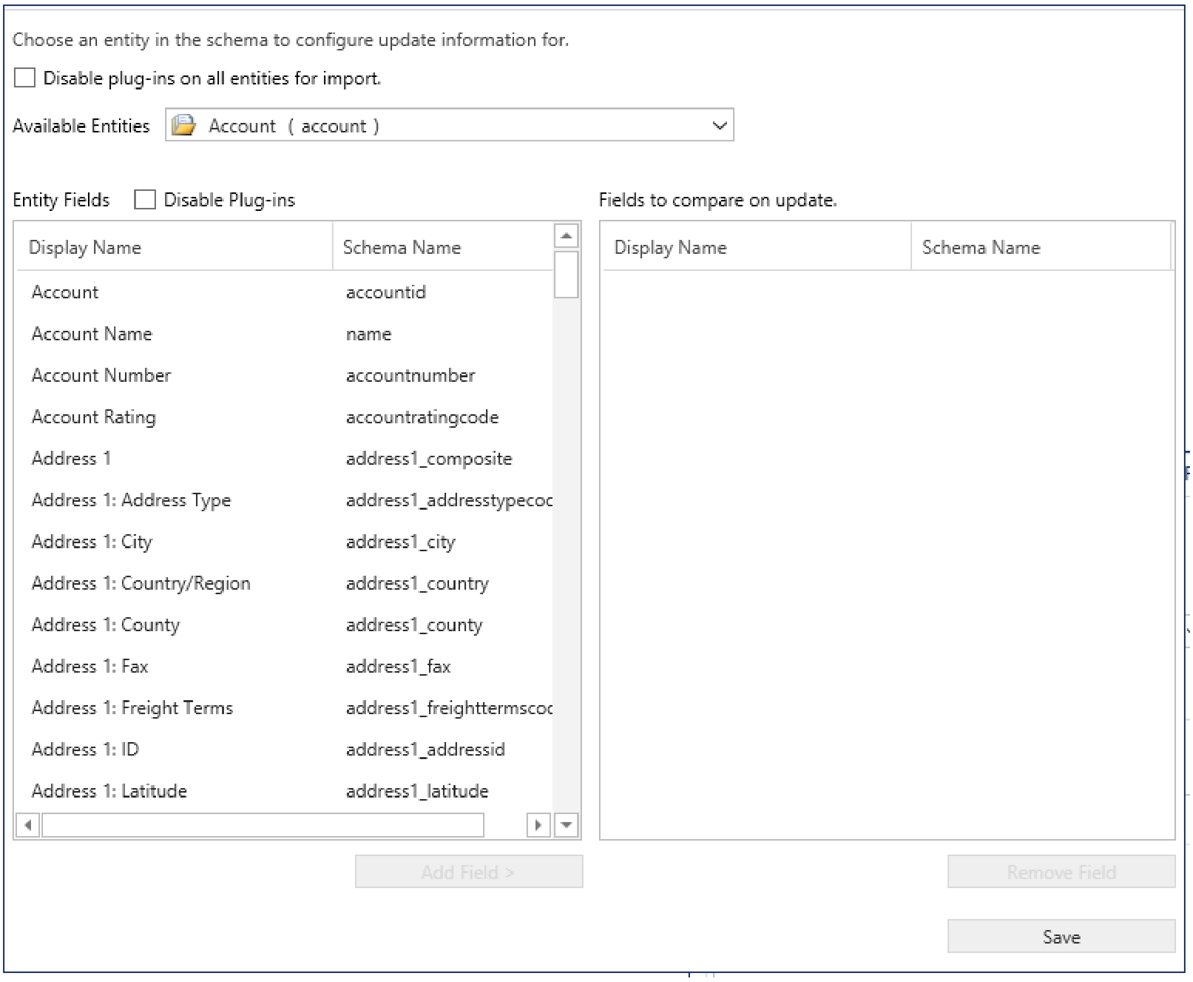

10. A message is displayed if there are any missing dependencies. To close the message, click **OK**.




11. Add the missing entities, and then perform step 9 again to validate the data. A confirmation message is displayed if there are no validation errors.

> **TIP**
>
> If the missing entity is not in the solution you selected for export, you can add the entity from the **Default Solution** by selecting it from the **Select the solution** list.

12. Define the uniqueness condition for your data to be exported. To open a new screen, click **Tools** > **Configure Import Settings**. For each entity that you have selected to export, add the field or fields on which you want the records to be compared with existing records on the target system during the import. Select a field, and click **Add Field**.




13. To disable plug-ins for all the entities before the data is imported on to the target system, select the **Disable plug-ins on all entities for import** check box. The tool will disable all the plug-ins while importing data on to the target server, and re-enable them after the import process.

14. To save the settings and return to the main screen, click **Save**.

> **NOTE**
>
> If you want to undo any changes in the **Configure Import Settings** dialog box, you must manually revert those changes in this dialog box, and then click **Save** to save your changes, and close the dialog box.

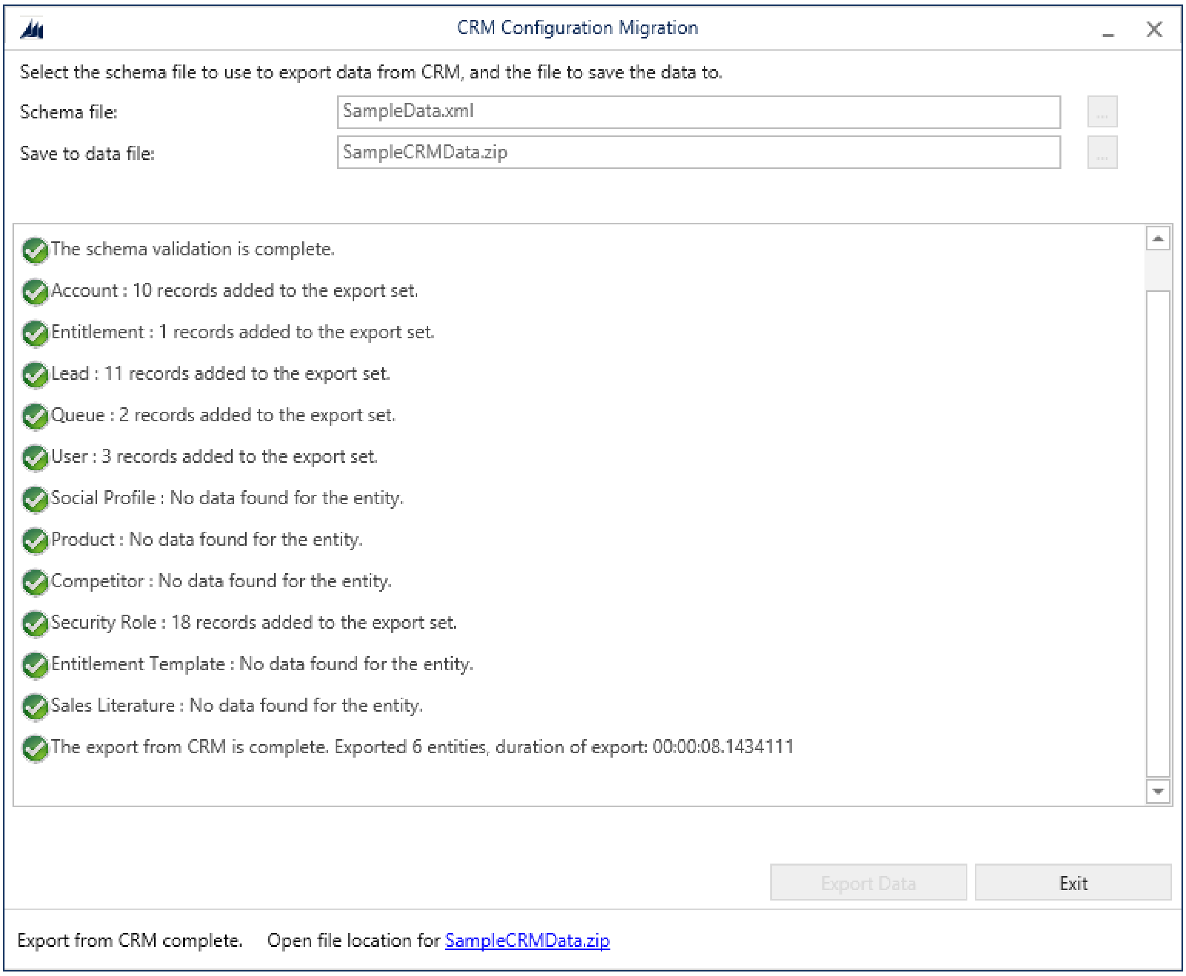
15. In the main screen:

    a. Click **File** > **Save Schema** to just save the schema without exporting the data. You are prompted to specify the name and location of the schema file (.xml) to save. You can use the schema later to export the data. You can exit the tool now.

    b. Click **Export Data** to export the data and schema file. You are prompted to specify the name and location of the schema file to be exported. Specify the name and location, and click **Save**. Go to the next step.

    c. Click **Save and Export** to choose whether to export the data after saving the schema file or not. You are prompted to specify the name and location of the schema file to be exported. Specify the name and location, and click **Save**. You are prompted to save the data file: click **Yes** to export it or **No** to export it later. If you clicked **Yes**, go to the next step.

16. On the next screen, specify the location of the data file to be exported in the **Save to data file** box, and then click **Export Data**. The screen displays the export progress status and the location of the exported file at the bottom of the screen once the export is complete.




17. Click **Exit** to close the tool.

# Reuse an existing schema to export configuration data

You can reuse a schema file that was generated using the Configuration Migration tool to quickly export data across Dynamics 365 instances without having to create the schema all over again.

1. Start the Configuration Migration tool.
2. On the main screen, click **Export data**, and click **Continue**.
3. On the **Login** screen, provide authentication details to connect to your Dynamics 365 instance from where you want to export data. If you have multiple organizations on the Dynamics 365 server, and want to select the organization from where to export the data, select the **Always display list of available orgs** check box. Click **Login**.
4. If you have multiple organizations, and you selected the **Always display list of available orgs** check box, the next screen lets you choose the organization that you want to connect to. Select a Dynamics 365 organization to connect to.
5. On the next screen, select the schema file to be used for the data export.
6. Specify the name and location of the data file to be exported.
7. Click **Export Data**. The screen displays the export progress status and the location of the exported file at the bottom of the screen once the export is complete.
8. Click **Exit** to close the tool.

**See also**

Download tools from NuGet

Modify a schema
Manage your configuration data
Import configuration data

# Configure date settings for demo data

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the information below to automatically keep your demo environment data current.

**Before you begin**

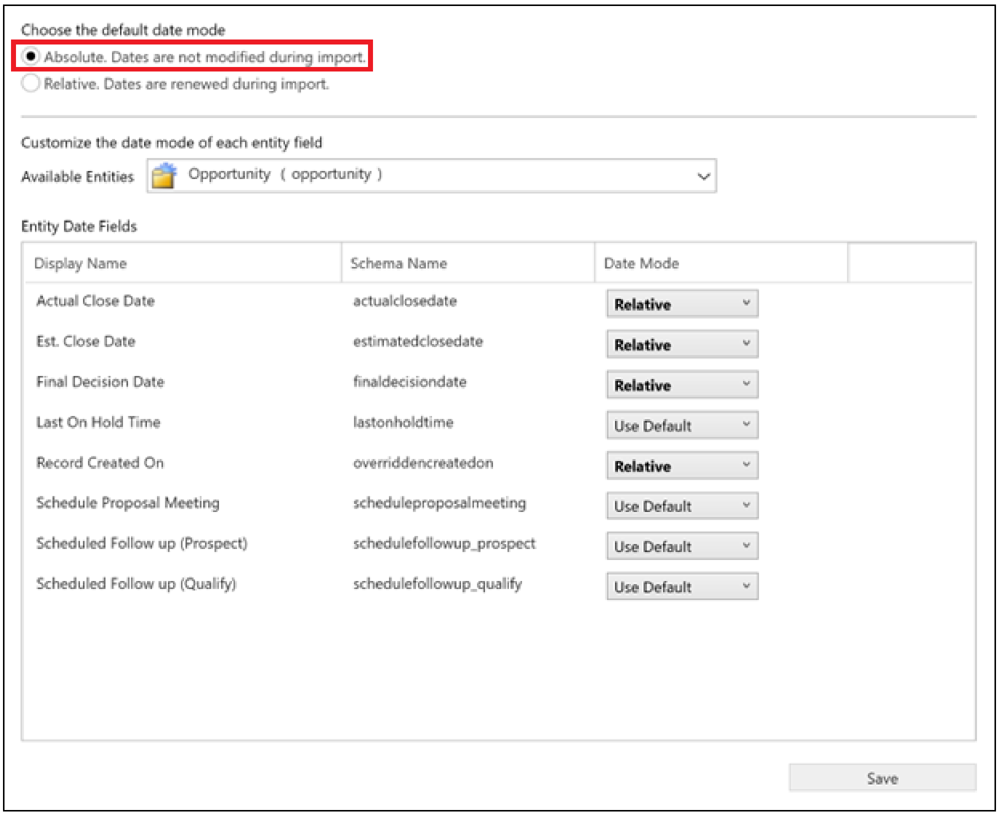
Download the Configuration Migration Tool. The Configuration Migration tool is available as a NuGet package. To download the tool, see Download tools from NuGet. Follow the steps on this page to extract the **DataMigrationUtility.exe** tool.

You can set the values of datetime fields to automatically move forward by a specified duration. This allows you to keep your demo data recent without the need to make manual updates. It will also work when using Configuration Migration Utility files with the Dynamics 365 Package Deployer tool.

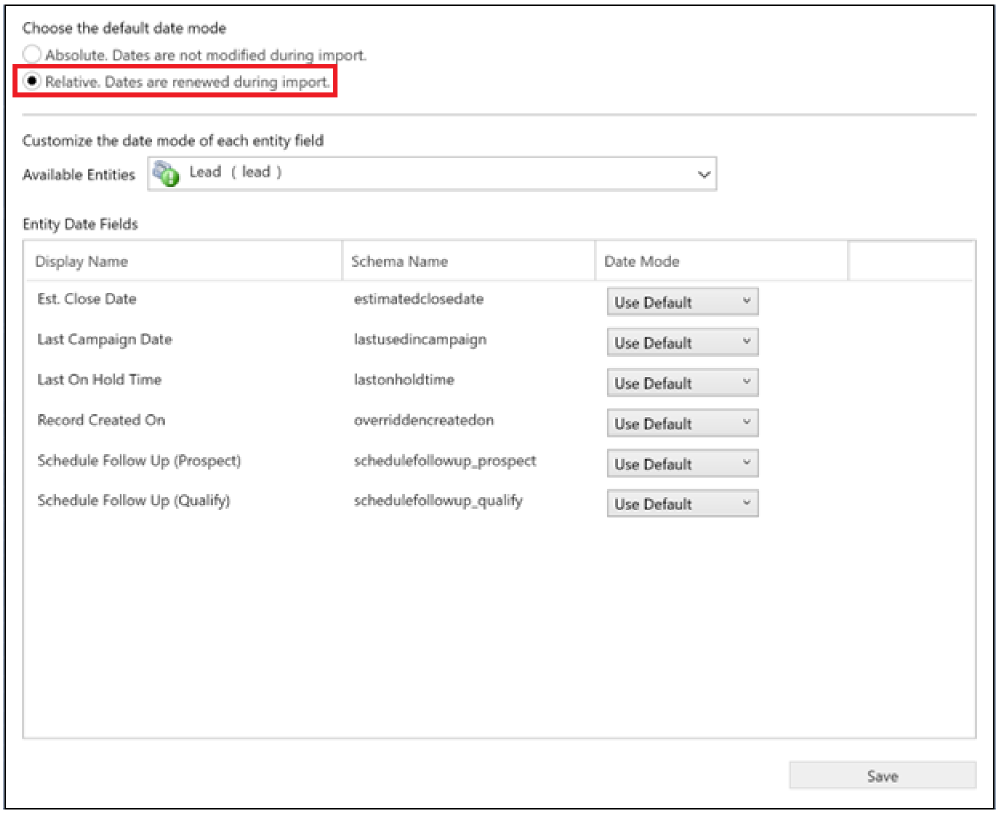
> **NOTE**
> This option is to keep data recent in your demo environments. It is not intended for production use.

1. Start the Configuration Migration tool. Double-click **DataMigrationUtility.exe** in the folder: [your folder]\Tools\ConfigurationMigration\
2. On the main screen, click **Create schema**, and click **Continue**.
3. On the **Login** screen, provide authentication details to connect to your Dynamics 365 instance from where you want to export data. If you have multiple organizations on the Dynamics 365 server, and want to select the organization from where to export the data, select the **Always display list of available orgs** check box. Click **Login**.
4. If you have multiple organizations, and you selected the **Always display list of available orgs** check box, the next screen lets you choose the organization that you want to connect to. Select a Dynamics 365 organization to connect to.
5. On the next screen, select the schema file to be used for the data export or build a new schema.
6. Click **Tools**, and then click **Configure Date Settings**.
7. Choose the default date mode and select an entity to apply the settings to.
   - Select **Absolute. Dates are not modified during import** if you do not want dates to move forward by default.

   > **NOTE**
   > You can still select individual fields to move forward at import. In the below example, only fields marked as **Relative** will be automatically moved.

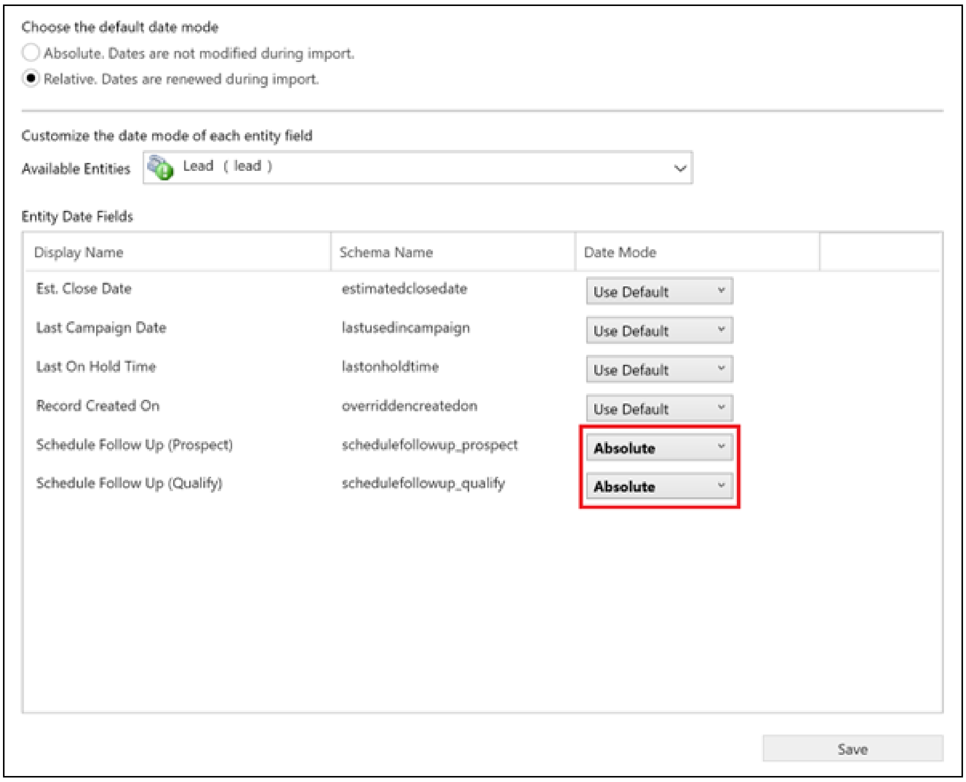



- Alternatively, select **Relative. Dates are renewed during import** if you want all date values to auto-move by default.




**NOTE**

This option will set dates to auto-move for all datetime fields on all entities. You may change this at the field level by selecting **Absolute**.




h. Verify your selections for all fields on all entities in your schema.

i. Click **Save and Export**.

j. Specify the name and location of the data file to be exported.

k. Click **Yes** on the prompt: **The schema save is complete. Would you like to export the data?**

l. Specify the name and location of the data file to be exported.

m. Click **Export Data**. The screen displays the export progress status and the location of the exported file at the bottom of the screen once the export is complete.

n. Click **Exit** to close the tool.

> **NOTE**
>
> Date values will be moved forward in one week increments at the time of import. The amount moved is based on the date/time of export and the date/time of import. The timestamp attribute in the header of the data.xml file contains the date and time of export.
>
> **Formula**: Imported date = exported date + (date of data import – date of data export)
>
> **Example**: To move dates forward by 3 months, and import the data on 10/1/2017: change the **timestamp** in the data.xml file to 7/1/2017.

## See also

Download tools from NuGet
Modify a schema
Manage your configuration data
Import configuration data

# Modify a configuration data schema

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can modify an existing schema file to include information about new configuration data or to update the existing configuration data definition to enhance the configuration data export process.

## Before you begin

Download the Configuration Migration Tool. The Configuration Migration tool is available as a NuGet package. To download the tool, see Download tools from NuGet. Follow the steps on this page to extract the **DataMigrationUtility.exe** tool.

- You must have a schema file that was created using the Configuration Migration tool. More information: Create a schema to export configuration data

## Modify a schema file

1. Start the Configuration Migration tool. Double-click **DataMigrationUtility.exe** in the folder: [your folder]\Tools\ConfigurationMigration\
2. On the main screen, click **Create schema**, and click **Continue**.
3. On the **Login** screen, provide authentication details to connect to your Dynamics 365 instance for which you originally created the export data schema file. If you have multiple organizations on the Dynamics 365 server, and want to select an organization, select the **Always display list of available orgs** check box. Click **Login**.
4. If you have multiple organizations, and you selected the **Always display list of available orgs** check box, the next screen lets you choose the organization that you want to connect to. Select a Dynamics 365 organization to connect to.
5. On the main screen, click **File** > **Load Schema**.
6. Navigate to the schema file that you want to edit, select it, and click **Open**.
7. The schema file definition appears in the Configuration Migration tool. Make the required changes to the schema definition file. For information about defining a schema file, see steps 5-14 in Create a schema to export configuration data.
8. Save the updated schema file.
9. Click **Exit** to close the tool.

**See also**

Import configuration data
Create a schema to export configuration data
Manage your configuration data

# Import configuration data

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

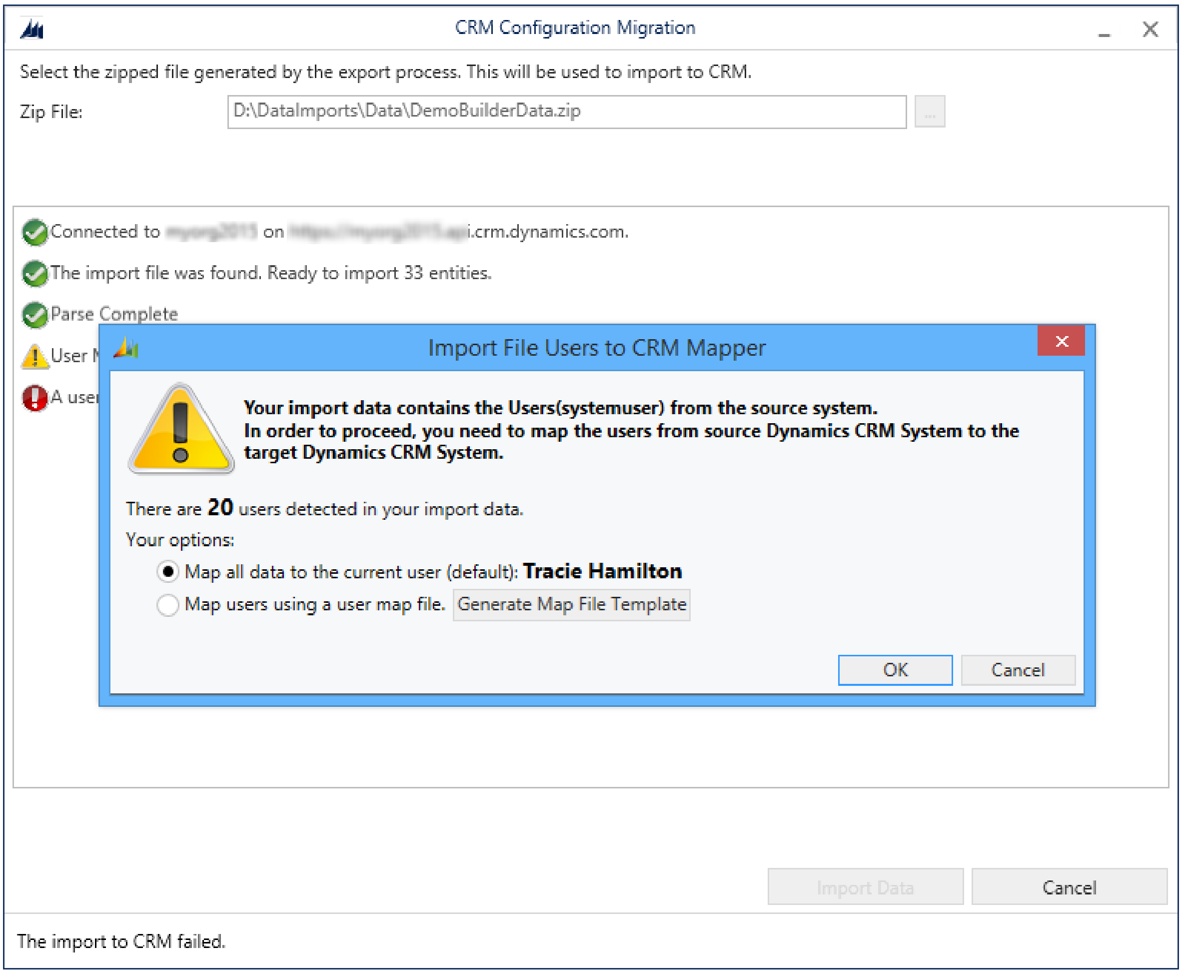
After exporting your configuration data from the source Dynamics 365 instance, you are now ready to import it to the target Dynamics 365 instance.

## Before you begin

Download the Configuration Migration Tool. The Configuration Migration tool is available as a NuGet package. To download the tool, see Download tools from NuGet. Follow the steps on this page to extract the **DataMigrationUtility.exe** tool.

## Import configuration data

1. Start the Configuration Migration tool. Double-click **DataMigrationUtility.exe** in the folder: [your folder]\Tools\ConfigurationMigration\
2. On the main screen, click **Import data**, and click **Continue**.
3. On the **Login** screen, provide authentication details to connect to your Dynamics 365 instance from where you want to import data. If you have multiple organizations on the Dynamics 365 server, and want to select the organization where to import the configuration data, select the **Always display list of available orgs** check box. Click **Login**.
4. If you have multiple organizations, and you selected the **Always display list of available orgs** check box, the next screen lets you choose the organization that you want to connect to. Select a Dynamics 365 organization to connect to.
5. Provide the data file. (.zip) to be imported. Browse to the data file, and select it. Click **Import Data**.
6. **This step is applicable only if the data that you are importing contains the user information of the source system**. Enter mapping user information on the target system. You can either map all of them to the user who is running the import process or map to individual users by using a user map file (.xml). If you choose the latter, you will have to either specify an existing user map file or the tool can generate it for you. If you generate a new file, fill in the mapping user name in the **New** parameter for every user on the source server. Select the user map file in the tool when you are done, and click **OK**.




The next screen displays the import status of your records. The data import is done in multiple passes to first import the foundation data while queuing up the dependent data, and then import the dependent data in the subsequent passes to handle any data dependencies or linkages. This ensures clean and consistent data import.

7. Click **Finish** to close the tool.

### See also

[Manage your configuration data using the Configuration Migration tool]

# Work with templates

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use templates in Customer Engagement in a variety of ways to speed your work and improve consistency.

# Create templates for articles

10/6/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Article templates help you create new articles for your organization's knowledge base library. You can also create templates with boilerplate text to help article writers use consistent language and messaging.

> **NOTE**
> This experience is applicable only to legacy Articles entity and not the new Knowledge Article entity.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Service Management**.
3. Select **Article Templates**.
4. To create a new article template, select **New**.
5. In the **Article Template Properties** dialog box, type the new article title, select the language, and then select **OK**.
6. To add a section, in the **Common Tasks** area, select **Add a Section**, and specify the following:

   a. In the **Title** box, type a title.

   b. In the **Instructions** box, type a description of the information that users should provide in this section when they use this template.

      When a user creates a new article with this template, these instructions appear in the body text for this section, and disappear when the user starts typing.

7. To reposition a section from the template, select the section you want to reposition, and in the **Common Tasks** area, select the green arrows to move the section to the position you want.

   When you select a section, its border turns green and the border lines become solid.

8. To remove the section, select the section you want to remove, and in the **Common Tasks** area, select **Remove a Section**.
9. To edit a section, select the section you want to edit, and in the **Common Tasks** area, select **Section Properties**. Edit the title and description.
10. To format the text, font, and color of the article title, headings, and body text of each section, use the tools on the **Modify** toolbar.
11. When you're done, select **Save** or **Save and close**.

After you save the template, it is immediately available for use. If the template is not complete and you want to finish it later, you can save the template, deactivate it (make it ready-only), and then complete it later. When the template is complete, you can reactivate it.

> **NOTE**
>
> If you need to back up your templates, or export them for use in a different implementation of Dynamics 365, you can export them as part of exporting customizations. More information: Export your customizations as a solution.

### See also

eBook: Use KB articles to help your customers

# Create templates for email

10/6/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

Applies to Dynamics 365 (online), version 8.x

Save time when creating multiple email messages by making email templates. Email templates contain prefilled data that you specify, so you don't have to re-enter the same information for each article.

An email template is attached to an email activity after the activity is created. Typically, each type of email activity has its own email template type; for example, an email activity created from a case record would use a case email template. You can also create global templates that are available for any record type, or personal templates available only to you, or organizational templates available to anyone in your organization.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Templates**.
3. Select **Email Templates**.
4. On the Actions toolbar, select **New**.
5. In the **Email Template Type** dialog box, in the **Template Type** list, select the type, and then select **OK**.

   > **IMPORTANT**
   > If you select a specific record type, such as lead or opportunity, the template is available only for that record type. This cannot be changed. To use the same content for another record type, create a new template.

6. On the **Email Templates** form, enter a **Title** and a **Subject**.
7. You can type a description of the template. This is not displayed to the recipient.
8. Type the text you want to send in this message. Use the Formatting toolbar to edit the text.

**TIP**

- Although you cannot insert images or HTML directly into Dynamics 365 email messages or email templates, you can use the copy feature in Internet Explorer to copy an image from a website and paste it into the email message or email template. The image is available as long as the website is accessible.
- To include a hyperlink in an email template, type the URL including the http://, for example, http://contoso.com. Do not include a period or comma or a space after the URL or the link will break. Select the link text and select **Make this a Hyperlink** ().

  A link is automatically added to the URL and the text is underlined and changed to blue.
- To include data fields in a hyperlink:

  a. Select the link text and data fields. For example: http://contoso.com/q?{!User : City;}

  b. Select **Make this a Hyperlink** ().

  The text and data fields will be converted to a hyperlink. For example: <a href="http://contoso.com/q?{!User : City;}">http://contoso.com/q?{!User : City;}</a>.

  The hyperlink text will appear as a link when the template is used in an email.
- There is no spell check built into Dynamics 365. There might be third-party solutions available. For more information, visit Microsoft Dynamics Solution Finder.
- The Formatting toolbar has limited fonts and font sizes. However, you can copy and paste content from Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press **Shift+Enter**.

9. To insert data fields to display information such as a customer's name or data from a quote, from a Dynamics 365 record, select **Insert/Update**, and then in the **Data Field Values** dialog box, select **Add**.
10. In the **Add Data Value** dialog box, select the **Record type** and **Field**, and then select **OK**.
11. Select **OK** again to insert the data.
12. To enter customers' first and last names, you'll need to repeat these three data-insertion steps; first and last names are separate data values.

**TIP**

Use the **Default Text** box to define what text is displayed if the record does not have data for the field.

13. Select **Save** or **Save and Close**.

**NOTE**

- To change a shared template to a personal one or a personal template to a shared one, on the template form, on the **Actions** menu, select **Revert to Personal Template**, or select **Make Template Available to Organization**.
- If you use an email template as a signature in another template, insert the signature template first. Otherwise, the Subject line will be overwritten.
- If you need to back up your templates, or export them for use in a different implementation of Dynamics 365, you can export them as part of exporting customizations. More information: Export your customizations as a solution.

**See also**

Work with templates

# Work with mail merge templates

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use mail merge templates with Office Word to create customer-ready letters, faxes, e-mail messages, and quotes.

Word templates are created and edited in Word, but can be uploaded to Dynamics 365 to use with mail merge and share with other users. Only Word .xml documents can be used as templates. To learn more about how to create mail merge templates, see the online Help in Word.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Templates**.
3. Click **Mail Merge Templates**.
4. To create a new mail merge template, click **New**.
5. In the **Mail Merge Templates** form, enter a **Name** and an **Associated Entity** (record type).
6. You can enter a description of the template. This is not displayed to the recipient.
7. Enter the **Ownership** and **Owner** information. Use the handy tooltips as a guide.
8. If you have enabled additional languages, you can select one for the template.
9. To attach the template, click **Browse**, search for the template on your computer, and then click **Attach**. Only .xml documents can be uploaded.
10. When you're done, click **Save and close**.

> **NOTE**
> To change a personal template to a shared one, after you save the record on the template form, on the **More Actions** menu, click **Make Available to Organization**. To revert the template to a personal one, click **Make Personal**.

**See also**

# Create or edit a campaign template using in-app marketing (Sales)

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Save time when creating multiple campaigns by creating a campaign template. Campaign templates contain prefilled data that you specify, so you don't have to reenter the same information for each campaign. You can either create a new campaign template or copy an existing campaign to use as a template.

## Create a campaign template

1. Go to **Marketing** > **Campaigns**.
2. Click **New Template**.

   - OR -

   Open the campaign you want to edit.
3. Add information in the template form just as you do when creating a campaign. In the template form, enter the information you want to appear in campaigns based on this template, and add items such as planning tasks, campaign activities, and marketing lists.
4. Click **Save** or **Save and Close**.

## Copy an existing campaign as a template

- Open the campaign that you want to copy. Click **Copy as Template**, type a name for the template, and click **Save**.

  If you need to back up your templates, or use them in a different implementation of Dynamics 365, you can export them as part of exporting customizations. More information: Export your customizations as a solution

> **NOTE**
> This topic applies to the Marketing work area within Microsoft Dynamics 365. The Dynamics 365 Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with Dynamics 365, you might be looking for a similar topic for that product. Dynamics Marketing provides a full-scale set of functionality, automation, and analytical insights for multistage and multichannel campaigns.

### See also

Get started with in-app marketing (Sales)
Create a marketing list using in-app marketing (Sales)
Create or edit a campaign using in-app marketing (Sales)
Create a quick campaign using in-app marketing (Sales)
Add an activity to a campaign using in-app marketing (Sales)
Add a marketing list, sales literature, or product to a campaign using in-app marketing (Sales)
Track a marketing campaign response using in-app marketing (Sales)

# Use entitlement templates to set up entitlements quickly

10/6/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

Quickly create other entitlements prefilled with the basic information like the start and end date, service level agreement (SLA), allocation type, and total term by using an entitlement template in Dynamics 365. For example, create a template for a standard entitlement, and then apply this template for every standard customer in your organization.

> **NOTE**
>
> With the Customer Engagement apps, version 9.1 release, entitlement templates in service management are available in the Customer Service Hub based on the Unified Interface experience. We recommend that you create and manage entitlement templates using the new experience.

## Create an entitlement template

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   **Check your security role**

   - Follow the steps in View your user profile.

   - Don't have the correct permissions? Contact your system administrator.

2. In the Customer Service Hub sitemap, go to **Service Management** and select **Templates** > **Entitlement Templates**.

   > **NOTE**
   >
   > In the Customer Service app, go to Go to **Settings** > **Service Management**. and select **Entitlement Templates**.

3. To create a new entitlement template, select **New** in the entitlement template search box.

4. Type or modify information in the text boxes.

   Hovertips provide hints about what to enter.

   - **Entitlement Template Name**. Enter a name for the entitlement template.

   - **Start Date**. Select the date from which the entitlement will be valid.

   - **End Date**. Select the date until which the entitlement will be valid.

   - **Restrict based on entitlement terms**. To restrict creating case when the entitlement term is over, select Yes. Otherwise, select **No**.

   - **SLA**. Select an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.

     Under **Entitlement Terms**, specify the term details for the entitlement:

- **Allocation Type**. Select whether the entitlement is for number of hours or number of cases.
- **Decrease Remaining On**. Select whether to decrease the remaining term on case creation or resolution.
- **Total Term**. Specify the total amount of support the customer is entitled to with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled to support up to 100 cases.

5. Select **Save**.

#### Add entitlement channels

Use the **Entitlement Channels** section to define the channels your customers are entitled to, and track the customer support term for each channel separately. For example, to use phone and email as support channels, and restrict them to 80 and 20 hours respectively, create an entitlement channel for each of them.

> **NOTE**
>
> You must save the template record before you can add entitlement channels to the template.

1. In the **Entitlement Channel** section, select **...** and select **Add New Entitlement Template Channel**.
2. Specify the total terms that you want to allot to the particular channel.

   The remaining term is auto-calculated and shows the total number of hours or cases remaining for the customer's entitlement.

#### Associate a product with the entitlement template

If you want the entitlement template to be applicable to specific products for an individual customer, associate a product to the template.

1. In the **Search for records** box, type the first few letters of the name of the product that you want to associate with the template.
2. While in the template record, in the **Products** section, select **...** and select **Add Existing Product**.

> **NOTE**
>
> In the Customer Service app, you can also select to open the template form in the **Form Editor** in case you want to add additional sections to the form.

#### See also

Create an entitlement to define the support terms for a customer

# Analyze and share your data with Excel templates

8/24/2018 • 10 minutes to read • Edit Online

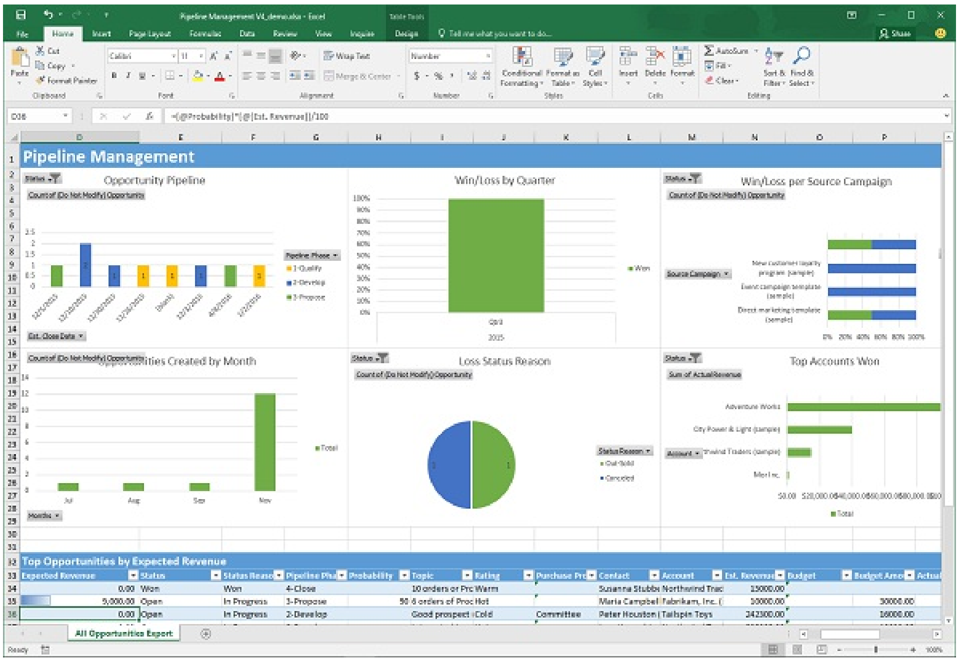
Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Excel provides powerful ways to analyze and present your Dynamics 365 data. With Excel templates, you can easily create and share your customized analysis with others in your organization.

Use Excel templates for:

- Sales Forecasting
- Pipeline Management
- Leads Scoring
- Territory Planning
- And much more...

  You can try out the Excel templates included with Microsoft Dynamics 365 to get a quick view of what kind of analysis is possible.

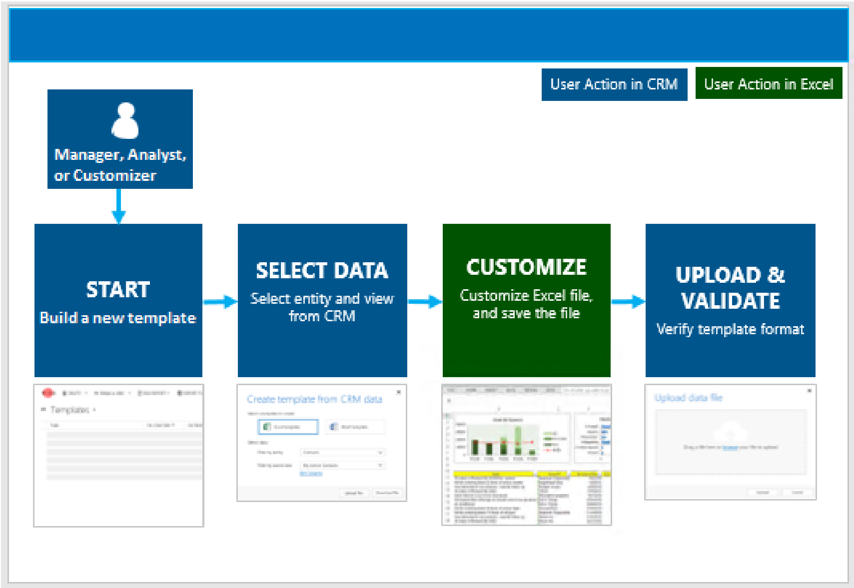



**TIP**

Check out the following video: Create documents directly from Dynamics CRM by using Word and Excel templates (2:38)

## Create a new Excel template

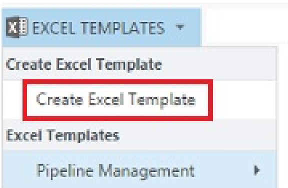
Following are the steps for creating an Excel template.



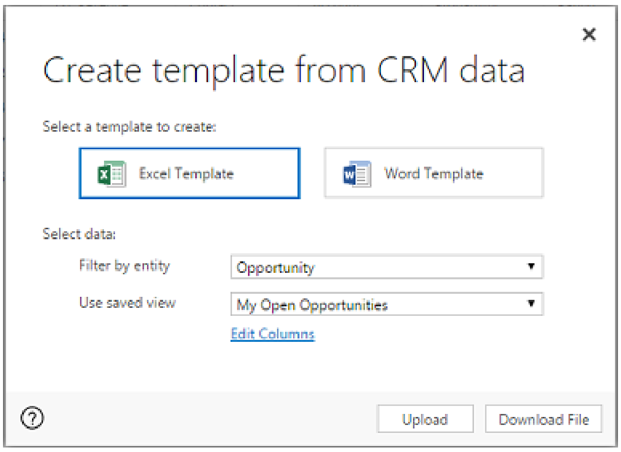

### Step 1: Create a new template from existing data

There are two places in Dynamics 365 where you can create an Excel template:

- **From the Settings page**. Go to **Settings** > **Templates** > **Document Templates** > **New** (+). You must have sufficient permissions to access to the Settings page, such as System Administrator or System Customizer.
- **From a list of records**. For example, go to **Sales** > **Opportunities** > **My Open Opportunities**. On the menu bar, click **Excel Templates** > **Create Excel Template**.




The **Create template from Dynamics 365 data** page appears.




#### Select the data to include in the template

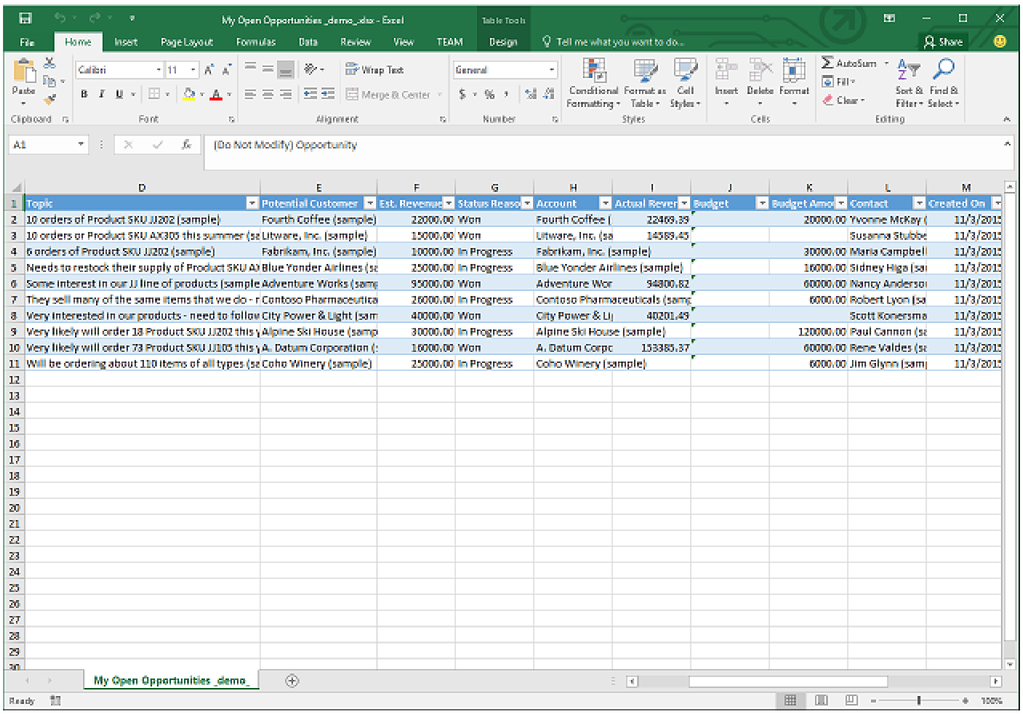
1. Click **Excel Template**.
2. Select an entity (record type) to include that entity's Dynamics 365 data. The views you can select in the next field depend on the entity you select.
3. Select a view.
4. Click **Edit Columns** to add, remove, and adjust properties for the columns to include in the template.

5. Click **Download File** to create the template file.

> **WARNING**
>
> You can also download a template containing no data except for the columns associated with the record type (entity) using **Settings** > **Data Management** > **Templates for Data Import**. For more information, see: Download a template for data import.

### Step 2: Customize the data in Excel

Open the newly-created template in Excel to customize the data.



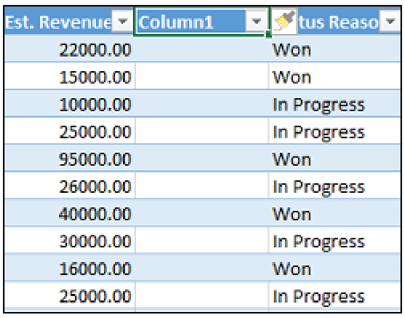
| | Topic | Potential Customer | Est. Revenue | Status Reason | Account | Actual Reven | Budget | Budget Amo | Contact | Created On |
|---|---|---|---|---|---|---|---|---|---|---|
| 2 | 10 orders of Product SKU JJ202 (sample) | Fourth Coffee (sample) | 22000.00 | Won | Fourth Coffee ( | 22469.39 | | 20000.00 | Yvonne McKay ( | 11/3/2015 |
| 3 | 10 orders or Product SKU AX305 this summer (sa | Litware, Inc. (sample) | 15000.00 | Won | Litware, Inc. (sa | 14589.45 | | | Susanna Stubbe | 11/3/2015 |
| 4 | 6 orders of Product SKU JJ202 (sample) | Fabrikam, Inc. (sample) | 10000.00 | In Progress | Fabrikam, Inc. (sample) | | | 30000.00 | Maria Campbell | 11/3/2015 |
| 5 | Needs to restock their supply of Product SKU AX | Blue Yonder Airlines (sa | 25000.00 | In Progress | Blue Yonder Airlines (sample) | | | 16000.00 | Sidney Higa (sa | 11/3/2015 |
| 6 | Some interest in our JJ line of products (sample | Adventure Works (samp | 95000.00 | Won | Adventure Wor | 94800.82 | | 60000.00 | Nancy Anderson | 11/3/2015 |
| 7 | They sell many of the same items that we do - r | Contoso Pharmaceutica | 26000.00 | In Progress | Contoso Pharmaceuticals (samp | | | 6000.00 | Robert Lyon (sa | 11/3/2015 |
| 8 | Very interested in our products - need to follow | City Power & Light (sam | 40000.00 | Won | City Power & Li | 40201.49 | | | Scott Konersma | 11/3/2015 |
| 9 | Very likely will order 18 Product SKU JJ202 this y | Alpine Ski House (samp | 30000.00 | In Progress | Alpine Ski House (sample) | | | 120000.00 | Paul Cannon (sa | 11/3/2015 |
| 10 | Very likely will order 73 Product SKU JJ105 this y | A. Datum Corporation ( | 16000.00 | Won | A. Datum Corpo | 153385.37 | | 60000.00 | Rene Valdes (sa | 11/3/2015 |
| 11 | Will be ordering about 110 items of all types (sa | Coho Winery (sample) | 25000.00 | In Progress | Coho Winery (sample) | | | 6000.00 | Jim Glynn (sam | 11/3/2015 |

Let's walk through a simple example of customizing an Excel template using Dynamics 365 sample data.

#### Example customization of Opportunities data

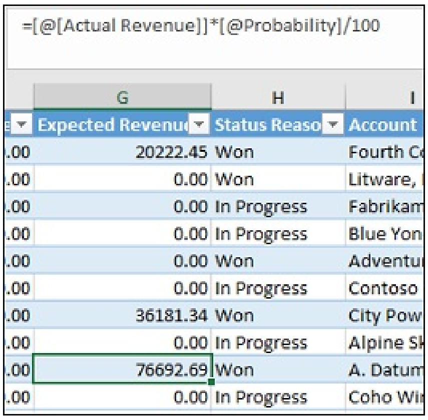
1. Click **Enable Editing** to allow customization of the Excel spreadsheet.

2. Add a new column and name it "Expected Revenue".



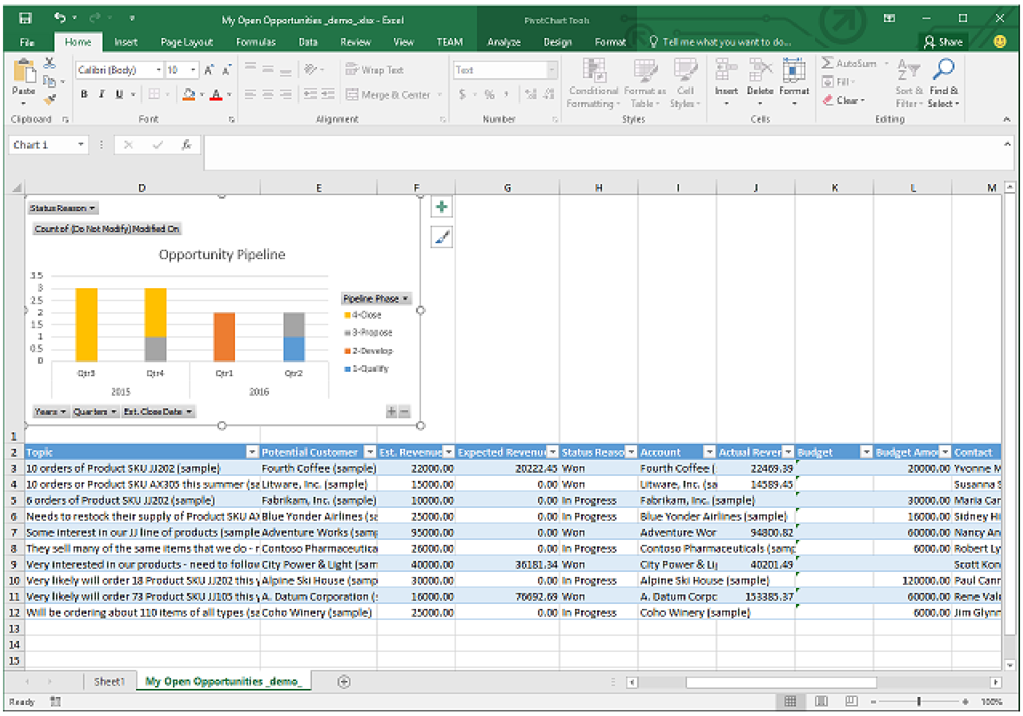
| Est. Revenue | Column1 | tus Reaso |
|---|---|---|
| 22000.00 | | Won |
| 15000.00 | | Won |
| 10000.00 | | In Progress |
| 25000.00 | | In Progress |
| 95000.00 | | Won |
| 26000.00 | | In Progress |
| 40000.00 | | Won |
| 30000.00 | | In Progress |
| 16000.00 | | Won |
| 25000.00 | | In Progress |

3. Create a formula for expected revenue. Don't refer to cells using their addresses; define and use names instead.




4. Create a pivot table and chart. These and other demo steps will be explained in a future update to this topic.

   Place user-added content above or to the right of the existing data table. This prevents the content from being overwritten if you add new data in Dynamics 365 later and you create a new Excel template. For more information, see: Best practices and considerations for using Excel templates.




5. Save the spreadsheet.

   You're now ready to upload the Excel template into Dynamics 365.

### Step 3: Upload the template and share with others

When you have your Excel template customized the way you want, you can upload it into Dynamics 365. Where you upload the template determines its availability.

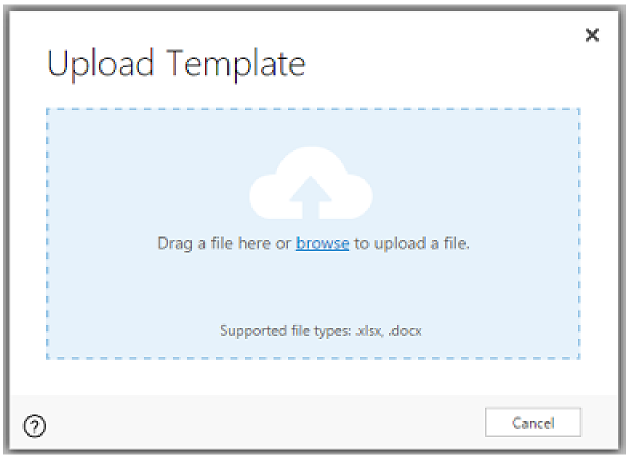
Dynamics 365 administrators can use the Settings page to upload the Excel template into Dynamics 365. A template uploaded in Settings is available to all users in your Dynamics 365 organization.

#### For admins: Upload the Excel template into Dynamics 365

1. In Dynamics 365, go to **Settings** > **Templates** > **Document Templates**.

2. Click **Upload Template**.

3. Drag the Excel file into the dialog box or browse to find and upload the file.




4. Click **Upload**.

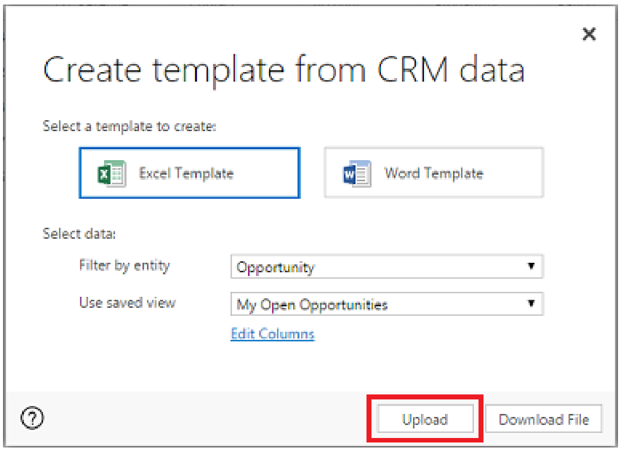
   Non-admin users can upload a template for their own use from a list of records.

**For non-admins or admins wanting to create a personal template: Upload the Excel template into Dynamics 365**

1. In Dynamics 365, open a page with a list of records, for example, the list of Sales Opportunities. Go to **Sales** > **Opportunities** > **My Open Opportunities**.

2. On the menu bar, click **Excel Templates** > **Create Excel Template**.

3. Click **Excel Template** > **Upload**.




4. Drag the file into the dialog box or browse to find and upload the file.

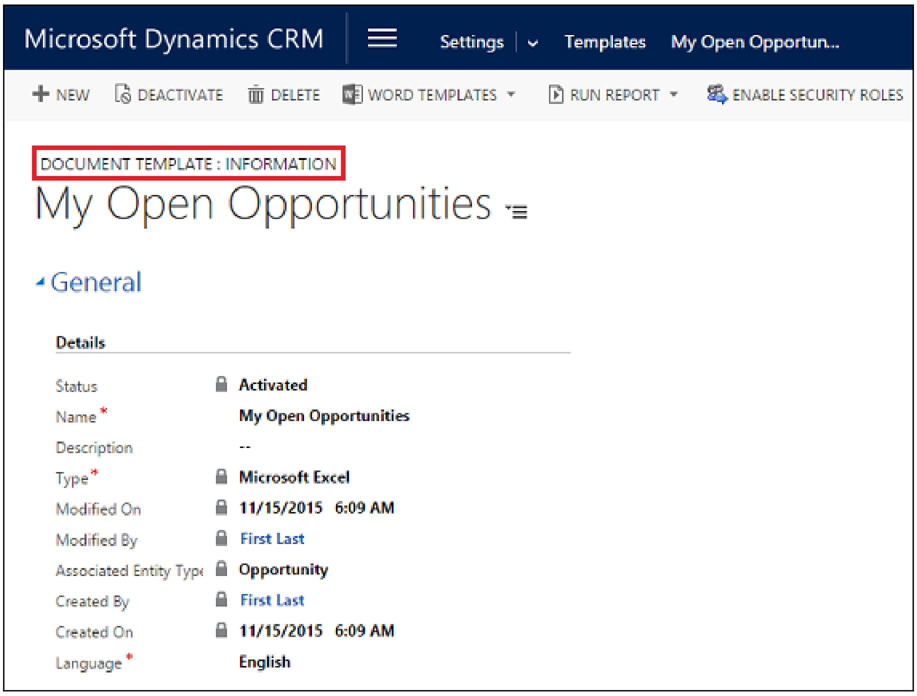
5. Click **Upload**.

### Step 4: Choose who can use the new template

Access to the newly-created Excel template depends on how you uploaded it, and on the access granted to the security role. Be sure to check out Use security roles to control access to templates.

### If you uploaded the template from the Settings page

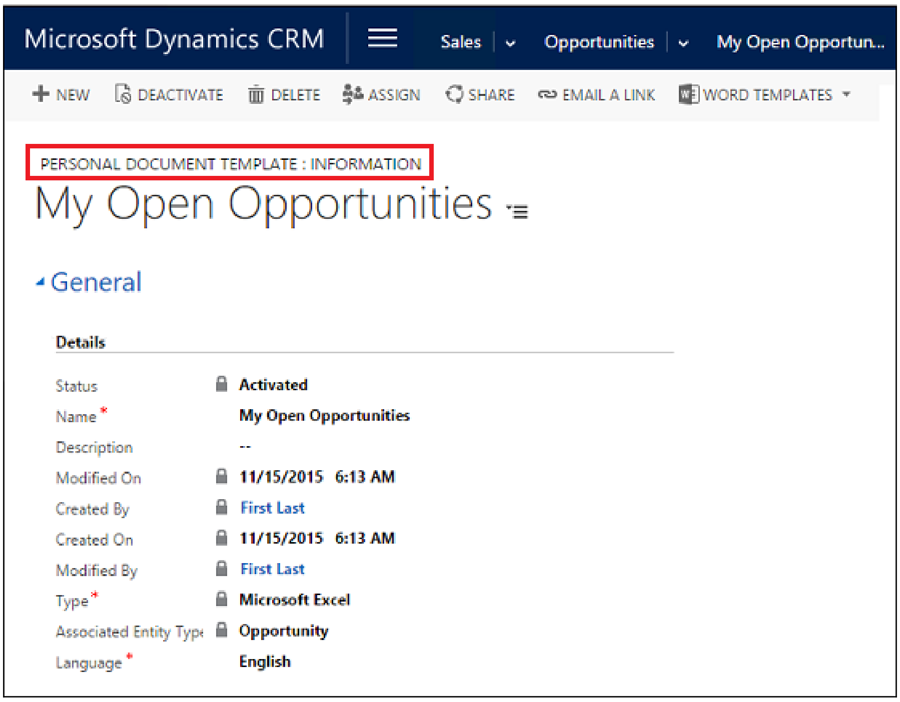
The Information page for the uploaded Excel template will look like this.




Templates uploaded from the Settings page are available to all users in your Dynamics 365 organization. You don't need to take any further action.

**If you uploaded the template from a list of records**

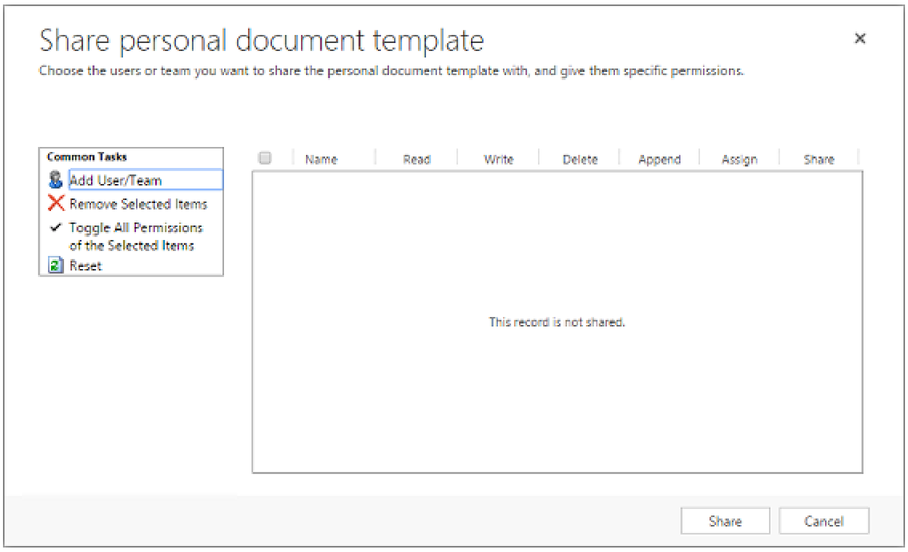
The Information page for the uploaded Excel template will look like this.




Templates uploaded from a list of records are available to the user who uploaded the template. To share the template with others, following these steps:

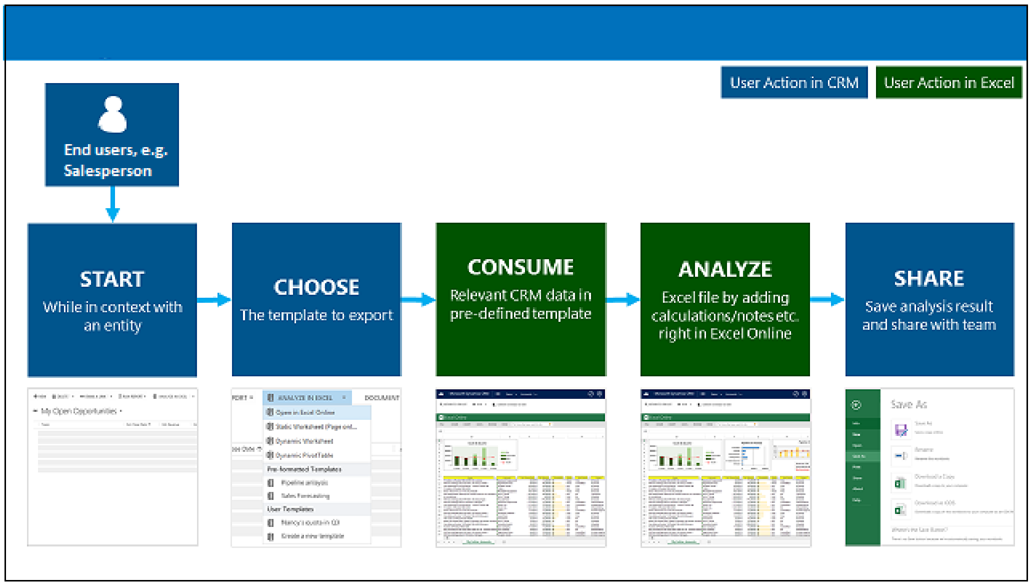
1. From the template Information page, click **Share**.

2. Use the **Share personal document template** page to share the Excel template with others and to set permissions.



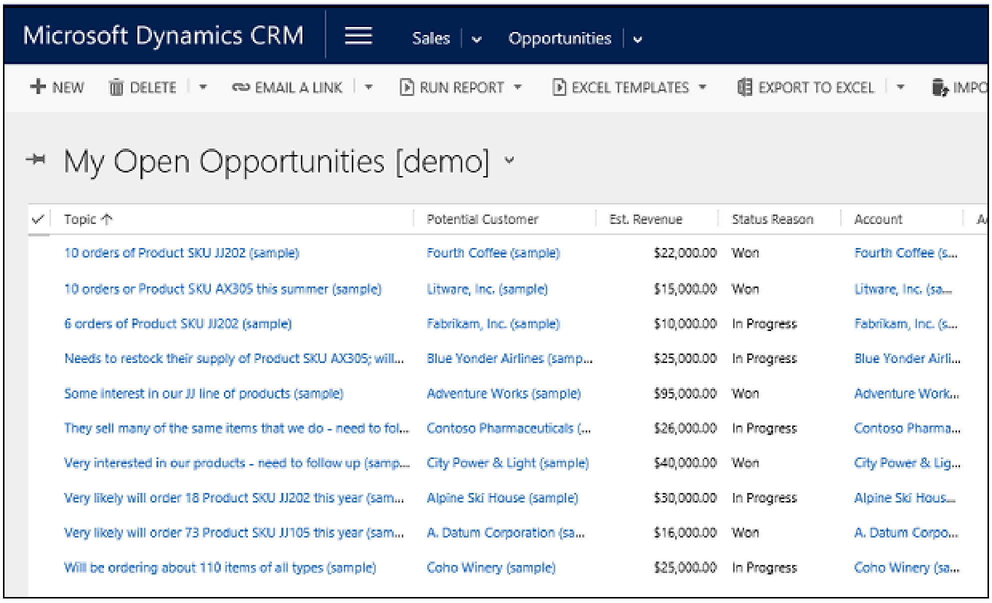

# Export and analyze data using the new template

The process for using an Excel template looks like this.



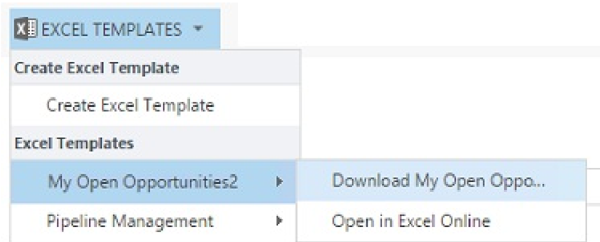

### Step 1: Select an entity to analyze

In Dynamics 365, select an entity (record type) to analyze with the Excel template you created. For example, go to **Sales** > **Opportunities** > **My Open Opportunities**. Two new opportunities were added since the template was created.




**Step 2: Export Dynamics 365 data using your new Excel template**

Choose the Excel template you created.




This template was created from the Settings page so it will appear on the menu under **Excel Templates**. If it had been created from a records list, it would appear under **Personal Excel Templates**.

If you have Microsoft Excel Online, you can see the data in place in an Excel window in Dynamics 365. If not, or if you'd rather create the Excel file, click **Download <template name>**.

**Step 3: Analyze your Dynamics 365 data in Excel**

What you see in the Excel spreadsheet is based on two things:

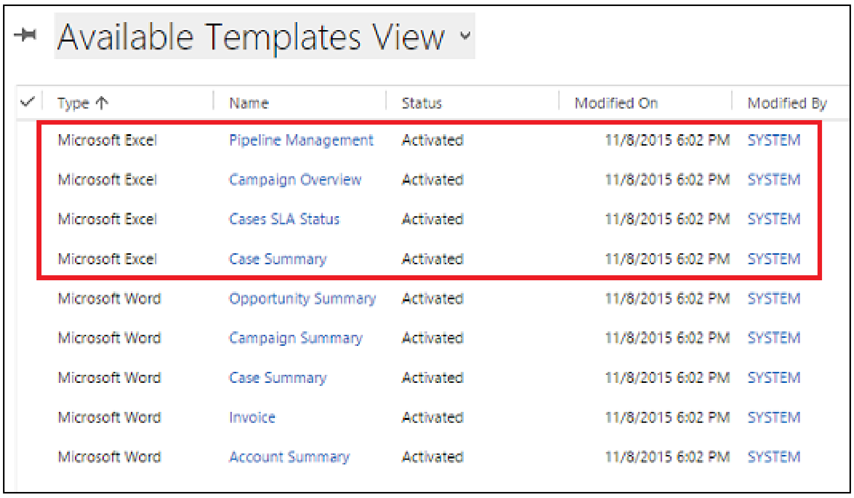
- **Dynamics 365 records**. The view you choose to export from determines what Dynamics 365 records you see in the exported Excel file. For example, if you selected Closed Opportunities, you'll see those records even if you used the template created with My Open Opportunities.
- **Columns**. The template you used determines what columns appear in the table in the exported Excel file. For example, the Closed Opportunities view has these columns: Potential Customer, Status, Actual Revenue, and Actual Close Date. But if the template you used was based on My Open Opportunities, you'd see columns associated with that view and any column filtering done when you created the template.

**Step 4: Share the results with others**

If you're using Excel, save a copy either online or to your computer. Send the file to others for their review and input.

# Try out the sample Excel templates

There are four Excel templates included with Microsoft Dynamics 365.



Available Templates View

| Type | Name | Status | Modified On | Modified By |
|---|---|---|---|---|
| Microsoft Excel | Pipeline Management | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Campaign Overview | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Cases SLA Status | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Case Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Opportunity Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Campaign Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Case Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Invoice | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Account Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |

The sample Excel templates were created with a specific record type (entity). You'll only be able to apply the template to records of the same record type.

| NAME | ENTITY |
|---|---|
| Pipeline Management | Opportunity (Sales area) |
| Campaign Overview | Campaign (Marketing area) |
| Cases SLA Status | Case (Service area) |
| Case Summary | Case (Service area) |

**To apply a sample Excel template**

1. Open a list of records with information with the entity type that matches the sample template. For example, open a list of sales opportunities to apply the Pipeline Management template.
2. Click **> Excel Templates**, and then under **Excel Templates**, select the sample template.
3. Download the template or open it in place in Excel.

> **TIP**
> You can export the templates that are included in Microsoft Dynamics 365, modify them, and then reimport them as new templates. This can give you a running start on creating your own custom Excel templates.

## Best practices and considerations for using Excel templates

Here are some things you need to be aware of to create and make best use of Excel templates in Dynamics 365.

**Test your Excel templates**

Excel has lots of features. It's a good idea to test your customizations to see that all Excel features work as expected in your templates.

**Privacy and pivot charts**

By default pivot chart data is not updated when a spreadsheet is opened. This can create a security issue if certain pivot chart data should not be seen by users with insufficient permissions.

**Consider the following scenario:**

- A Dynamics 365 administrator creates a template with sensitive data in pivot charts and uploads the template into Dynamics 365.

- A salesperson who should not have access to the sensitive data in the pivot charts uses the template to create an Excel file to do some data analysis.

  **The outcome.** The salesperson might be able to see the pivot chart data as uploaded by the Dynamics 365 administrator including access to views the salesperson does not have permissions for.

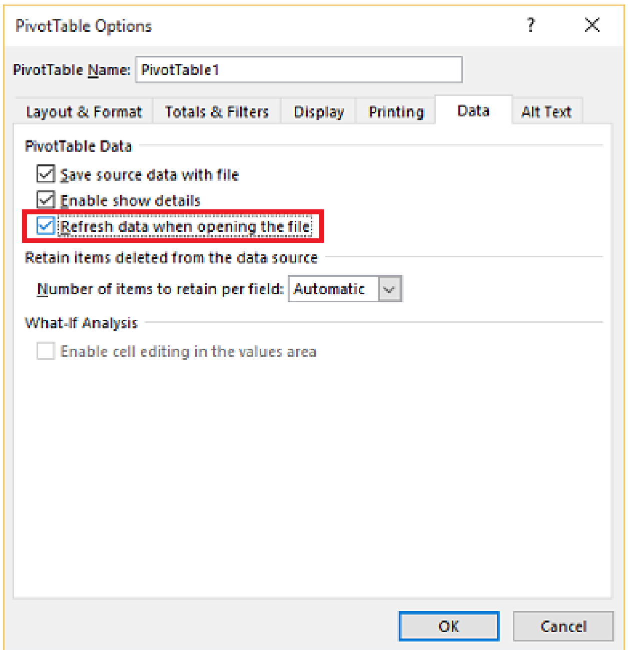
  **In addition.** iOS does not support updating pivot data and pivot charts when using the Excel app on iOS devices.

  **Recommendation.** Sensitive data should not be included in pivot tables and pivot charts.

#### Set pivot chart data to automatically refresh

Be default, pivot chart data does not automatically refresh when you open the spreadsheet. Regular charts automatically update.

In Excel, right-click the pivot chart, and then click **PivotChart Options** > **Refresh data when opening the file**.




#### Placing new data

If you want to add content to the Excel template, place your data above or to the right of the existing data. A second option is to place your new content on a second sheet.

#### Excel templates with images may cause an error

If you try to analyze Dynamics 365 data with an Excel template that has an image saved in it, you may see the following error: "An error occurred while attempting to save your workbook. As a result, the workbook was not saved." Try removing the image from the template and reloading it into Dynamics 365.

#### Excel templates and Office Mobile app in Windows 8.1

Excel templates will not open in Windows 8.1 devices with Office Mobile app. You'll get the following error message: "We've recovered as much of your document as we could, but you can't edit it. Try to open and repair the document on your PC to fix the problem."

This is a known issue.

#### Use table column names and range names in formulas

When you create Excel formulas, don't use column titles or cell numbers. Instead, use the table column names, and define names for cells or cell ranges.

# Use security roles to control access to templates

Dynamics 365 administrators can control access to Excel templates with some granularity. For example, you can give salespeople Read but not Write access to an Excel template.

1. In Dynamics 365, click **Settings** > **Security** > **Security Roles**.

2. Select a role, and then click the Business Management tab.

3. Select **Document Template** to set access for templates available to the entire organization. Select **Personal Document Template** for templates shared to individual users.

4. Click the circles to adjust the level of access.


### To view and delete personal document templates

Follow these steps to delete personal document templates:

1. Click Advanced Find ( ).

2. For **Look for**, select **Personal Document Templates**.

3. Click **Results (!)**.

4. Select the personal document template to delete, and then click Delete ( ).

### Excel template does not upload in Microsoft Edge

If your Excel template does upload in Dynamics 365 when using Microsoft Edge as your browser, update Microsoft Edge and try again.

# Privacy notice

If you use Microsoft Dynamics 365 (online), exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from Dynamics 365 (online) to your computer by using a secure connection, and no connection is maintained between this local copy and Dynamics 365 (online).

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and Dynamics 365 (online). Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with Dynamics 365 (online) using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization's users are permitted to export data to Excel by using security roles.

**See also**

Download a template for data import
Using Word templates in Dynamics 365

# Use Word templates to create standardized documents

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

After you create and import Office Word templates into Dynamics 365, with one click users can generate standardized documents automatically populated with Dynamics 365 data. This feature has some special considerations you should know about to successfully create Word templates.

> **TIP**
> Check out the following video: Create documents directly from Dynamics CRM by using Word and Excel templates (2:38)

> **WARNING**
> There is a known issue when creating templates in Word. This topic contains information on how to prevent interactions that could potentially destabilize Word. See: Important! A known issue and how to avoid it

The following are the supported versions of Word.

| AREA | WORD VERSION |
|---|---|
| Creating a Word template | 2013, 2016 |
| Using a Word document generated in Dynamics 365 | 2010, 2013, 2016 |

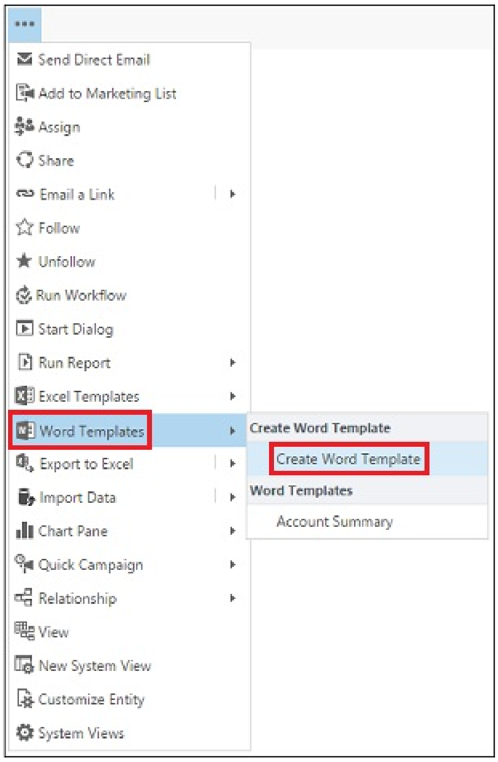
Follow the steps in this topic to successfully create and use Word templates in Dynamics 365.

## Step 1: Create a Word template

**Where you can create a template**

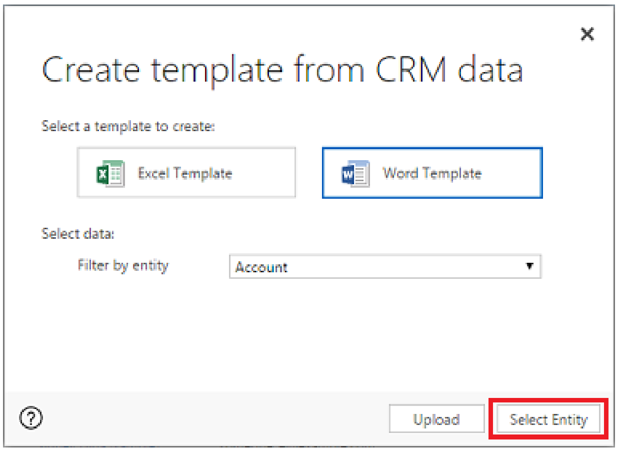
There are three places in Dynamics 365 where you can create a Word template:

- **From the Settings page**. Go to **Settings** > **Templates** > **Document Templates** > **New**(+). You'll need sufficient permissions to access to the Settings page, such as System Administrator or System Customizer.
- **From a record**. Open a record such as an account in Sales. Go to **Sales** > **Client_Accounts** > **My Active Accounts**. Click an account to open it, and then click **More** (**...**) > **Word Templates** > **Create Word Template**. Templates created here are personal and available only to the user creating the template.
- **From a list of records**. For example, go to **Sales** > **Client_Accounts** > **My Active Accounts**. Select a single account, and then click **More** (**...**) > **Word Templates** > **Create Word Template**.

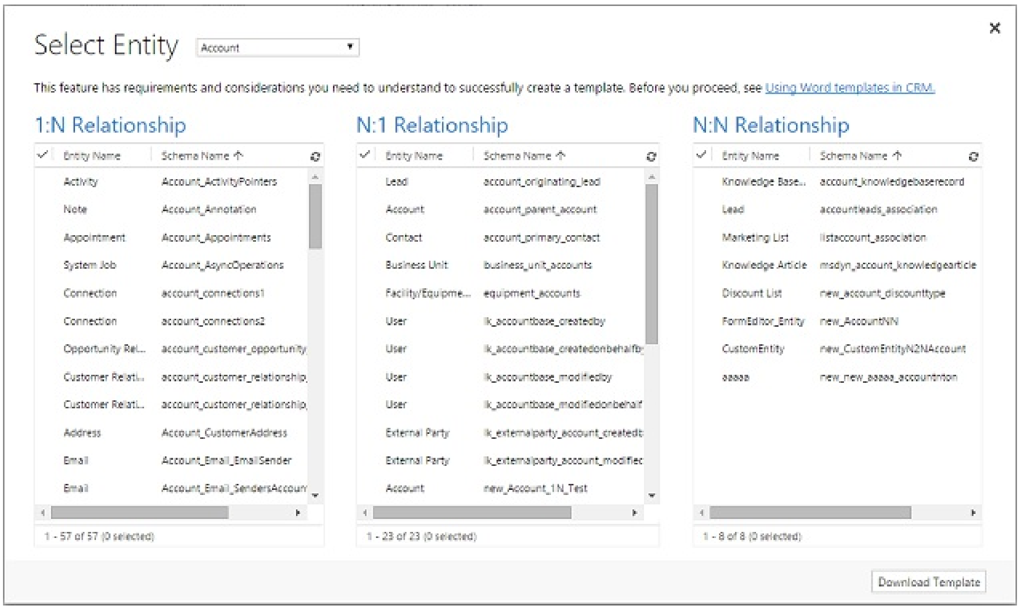



> **TIP**
>
> To delete personal document templates, do the following:
>
> 1. Click Advanced Find ( ).
> 2. For **Look for**, select **Personal Document Templates**.
> 3. Click **Results** (!).
> 4. Select the personal document template to delete and then click Delete ( ).

After clicking **Create Word Template**, select an entity to filter with, and then click **Word Template** > **Select Entity**.



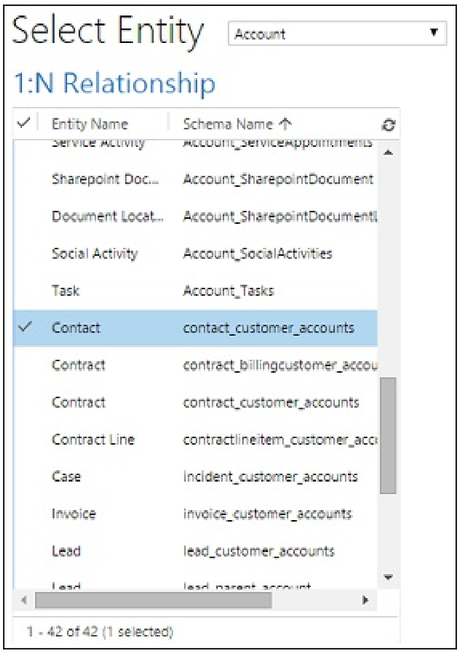

The relationship selection page appears.

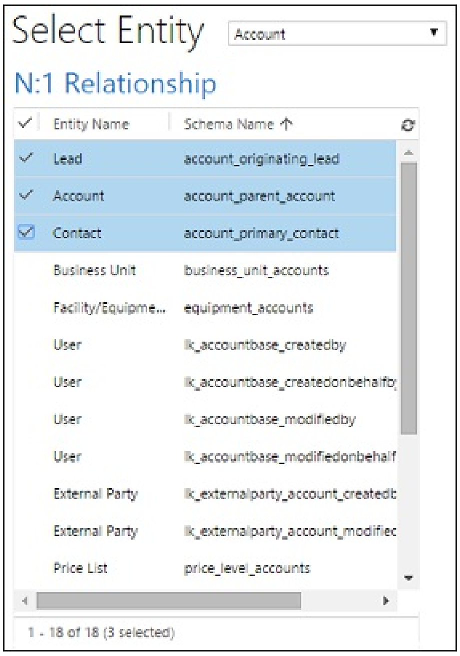
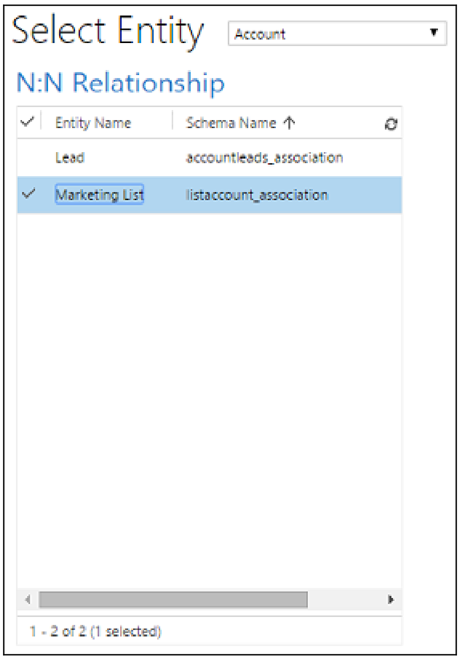



**What are 1:N, N:1, and N:N relationships?**

This screen requires an understanding of your Dynamics 365 data structure. Your Dynamics 365 administrator or customizer can provide information about entity relationships. For admin content, see: Create and edit entity relationships.

Here are some example relationships for the Account entity.

| RELATIONSHIP | DESCRIPTION |
|---|---|
|  | An account can have multiple contacts. |

| RELATIONSHIP | DESCRIPTION |
|---|---|
|  | A lead, account, or contact can have multiple accounts. |
|  | An account can have multiple marketing lists.<br><br>A marketing list can have multiple accounts. |

The relationships you select on this screen determine what entities and fields are available later when you define the Word template. Only select relationships you need to add Dynamics 365 data to the Word template.

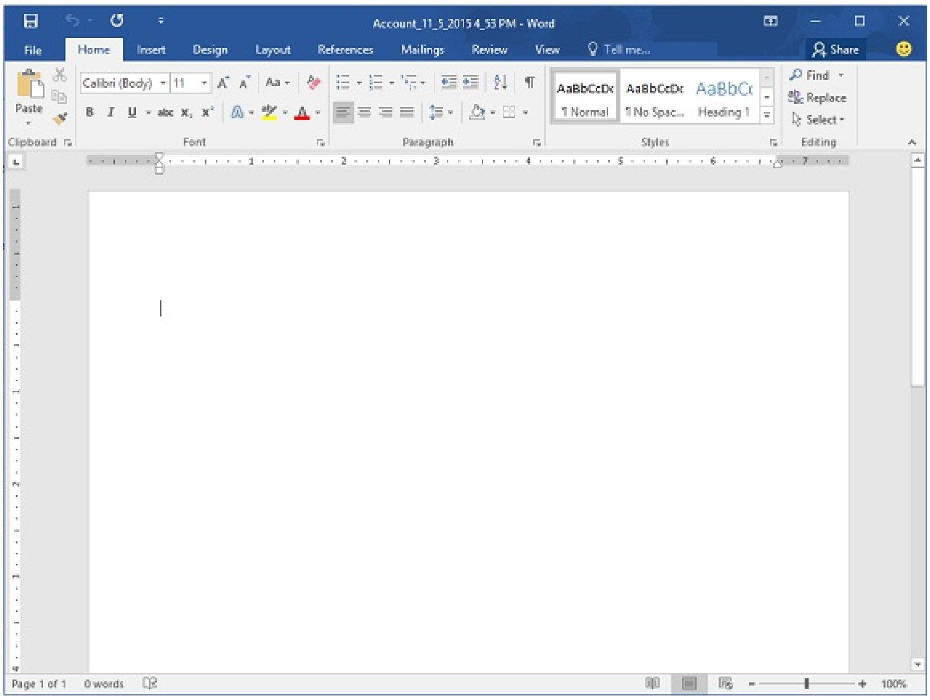
> **NOTE**
>
> To ensure documents download in a timely matter, there is an upper limit of 100 for the number of related records returned for each relationship. For example, if you're exporting a template for an account, and you want to include a list of its contacts, the document will return at most 100 of the account's contacts.

**Download the template**

Click **Download Template** on the **Select Entity** page to create a Word file on your local computer with the exported entity included as XML data.

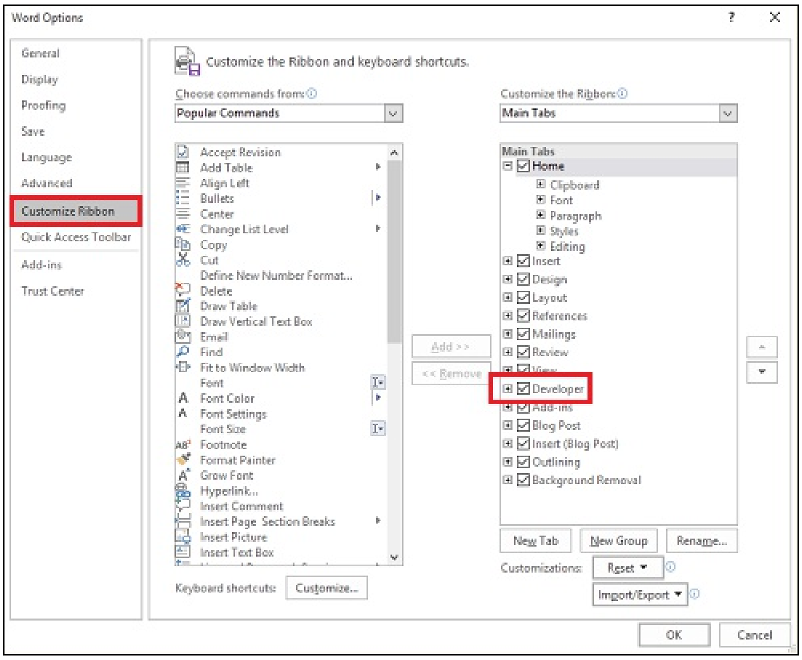
## Step 2: Enable the Developer tab

Open the Word template file. At this point, the document appears to be blank.



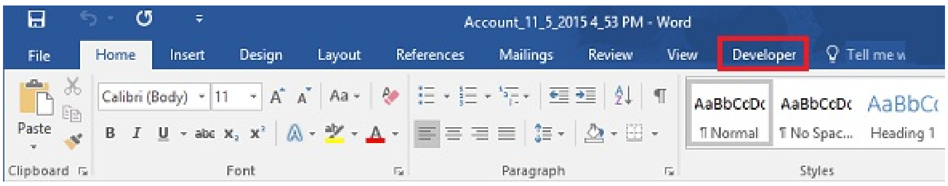

To see and add Dynamics 365 XML data, you need to enable the Word Developer tab.

1. Go to **File** > **Options** > **Customize Ribbon**, and then enable **Developer**.




2. Click **OK**.

   **Developer** now appears in the Word ribbon.




# Important! A known issue and how to avoid it

There's a known issue with Dynamics 365-generated Word templates and Office Word. In the next section, you'll be adding XML content control fields to the Word template.

**WARNING**

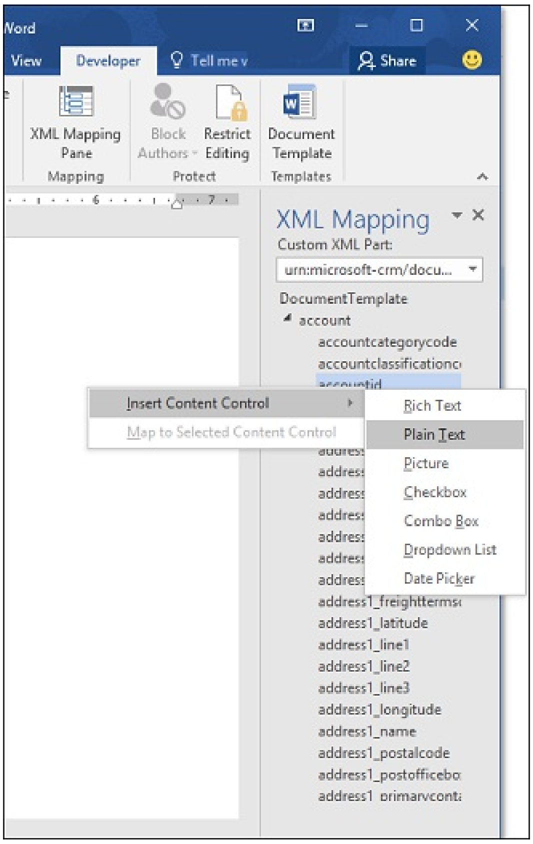
A few things can cause Word to freeze, requiring you to use Task Manager to stop Word:

- You insert a content control other than **Picture** or **Plain Text**.
- You make a textual change, such as changing the capitalization or adding text, to a content control. These changes can occur through AutoCorrect as well as user edits. By default, Microsoft Word AutoCorrect capitalizes sentences. When you add a content control field, Word sees it as a new sentence and will capitalize it when focus shifts away from the field.

To prevent issues with control fields, do the following:

**Only add fields as Plain Text or Picture**

1. You use the XML Mapping Pane to add Dynamics 365 entity fields to your Word template. Be sure to only add fields as **Plain Text** or **Picture**.



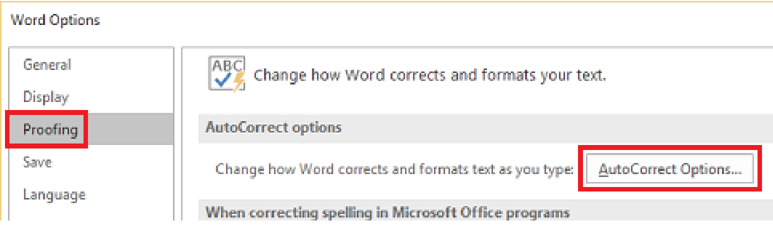

**Do not make any textual changes to the added content control**

1. You can make formatting changes to content control fields, such as bolding the text, but no other textual changes, including capitalization changes.

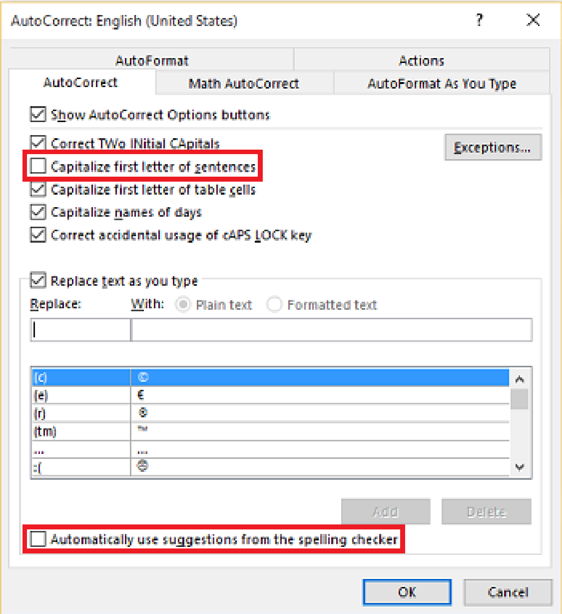

If you experience Word freezing or performance degradation, try turning off AutoCorrect.

**Turn off AutoCorrect**

1. With the template file open in Word, go to **File** > **Options** > **Proofing** > **AutoCorrect Options**.




2. Deselect **Capitalize first letter of sentences** and **Automatically use suggestions from the spelling checker**.




3. Deselect **Hyphens (--) with dash (-)** on the **AutoFormat** and **AutoFormat as You Type** tabs.

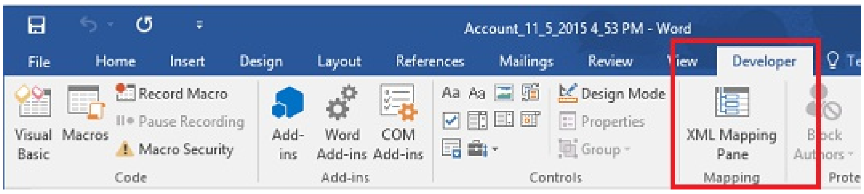
4. Click **OK**.

   If you followed the above recommendations, you’re ready to define the Word template.

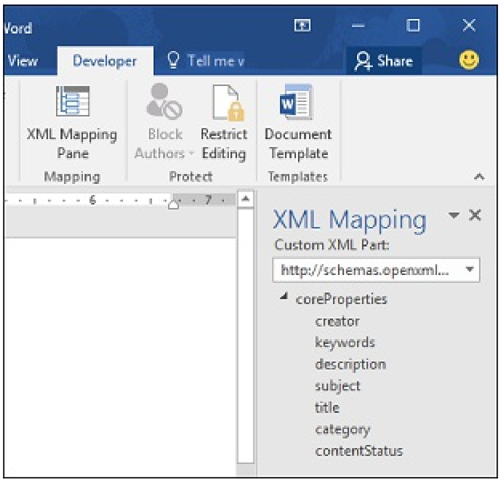
## Step 3: Define the Word template

Use the XML Mapping Pane to define the Word template with Dynamics 365 entity fields.

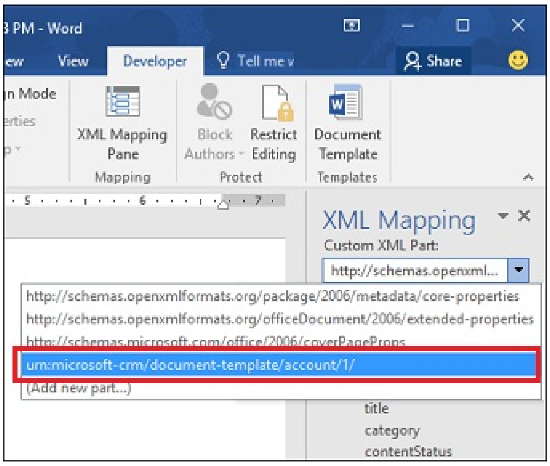
1. In your Word template, click **Developer** > **XML Mapping Pane**.




   The default XML schema is selected.



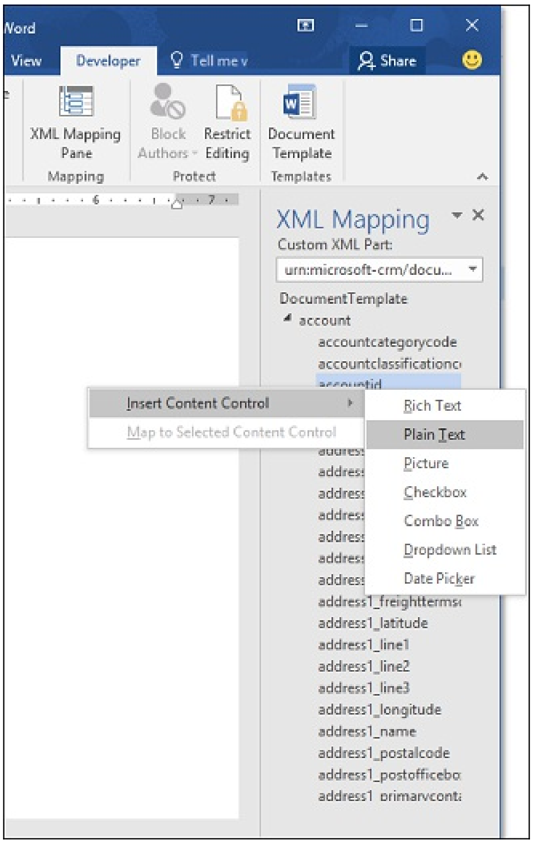

2. Select the Dynamics 365 XML schema. It will begin with "urn:microsoft-crm/document-template/".



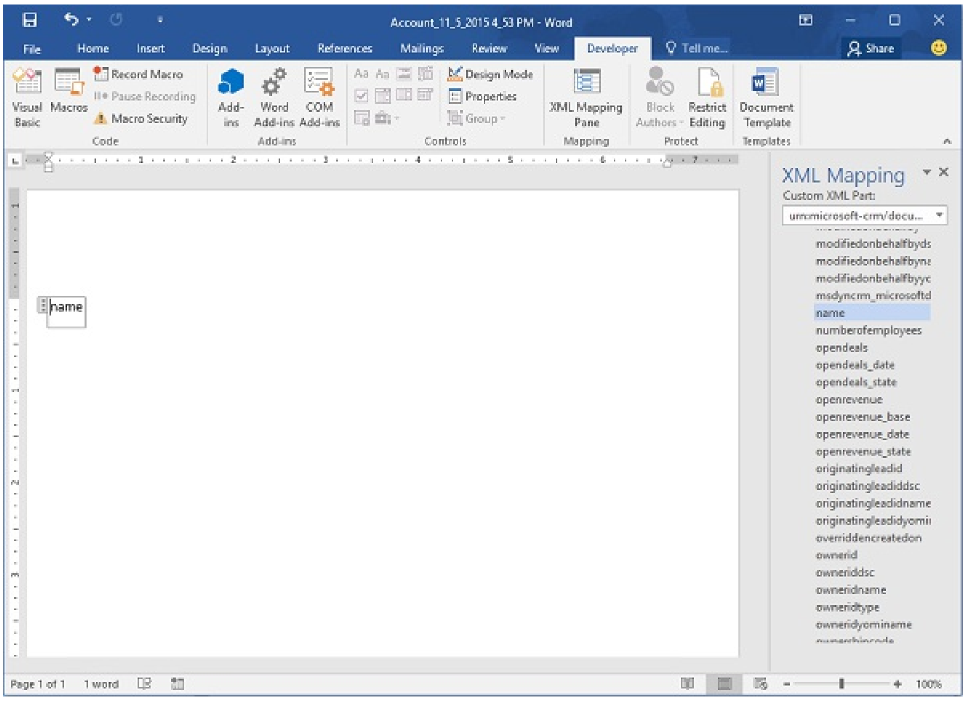

**IMPORTANT**

If you have frequent accidental edits that cause Word to freeze or have performance degradation, be sure to turn off the AutoCorrect options according to the section: "A known issue and how to avoid it".

3. Expand the Dynamics 365 entity, right-click the entity field, and then click **Insert Content Control** > **Plain Text**.

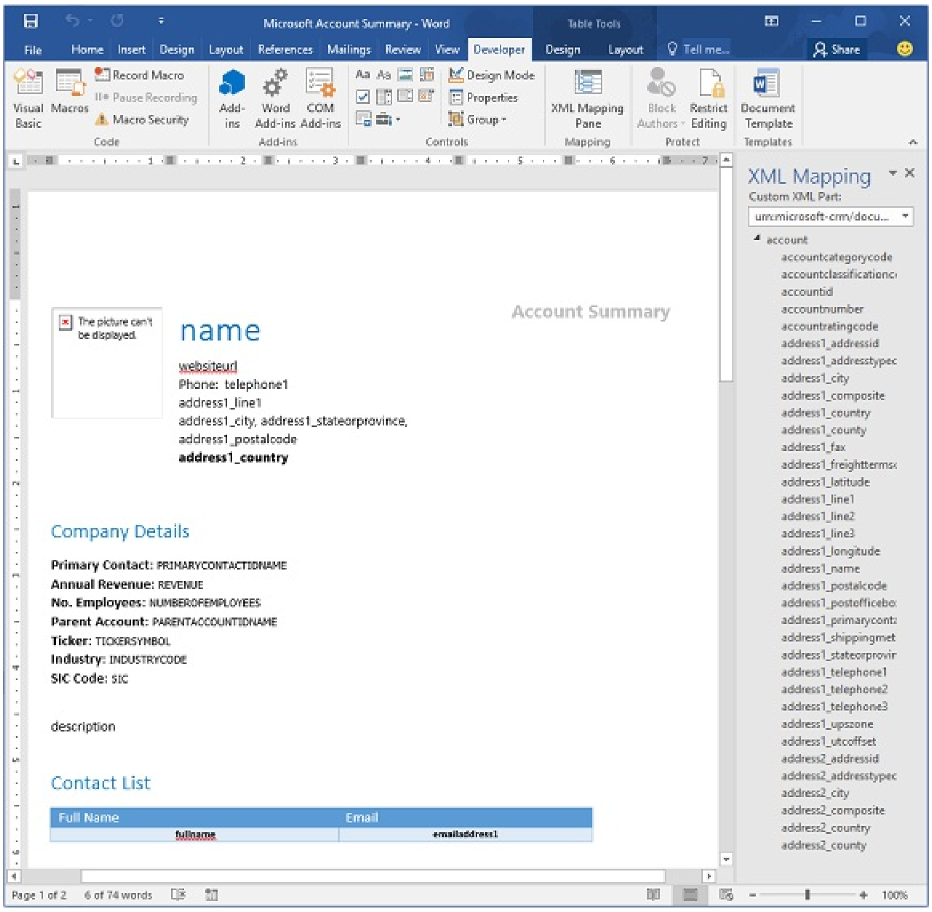



The Dynamics 365 entity field is added to the Word template.




Add additional entity fields, add descriptive labels and text, and format the document.

A completed template might look like this:

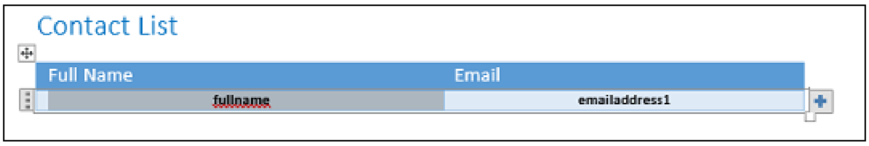


Some content control fields you entered likely have multiple lines of data. For example, accounts have more than one contact. To include all the data in your Word template, set the content control field to repeat.

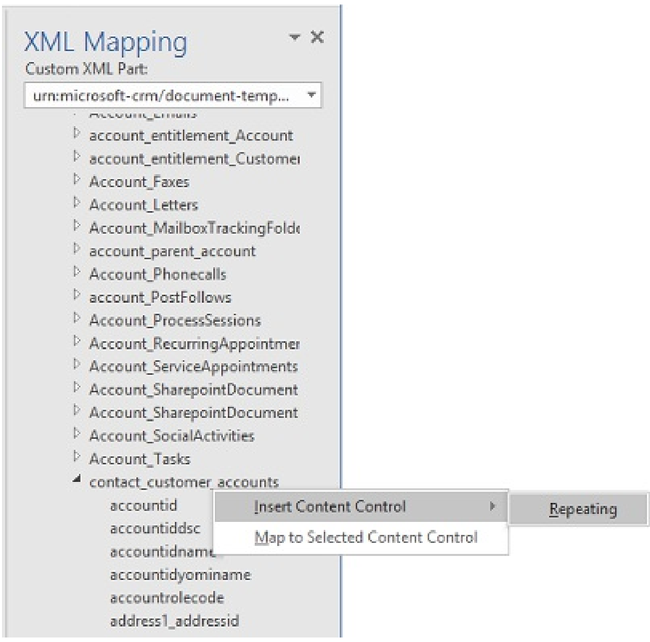
### Set content control fields to repeat

1. Put fields with repeating data in a table row.

2. Select the entire table row in the template.




3. In the XML Mapping Pane, right-click the relationship containing the content control fields, and then click **Repeating**.




When you use the Word template in Dynamics 365 to create a document, the table will populate with multiple rows of data.

When the template has the fields and formatting you want, save it and upload it into Dynamics 365.

## Step 4: Upload the Word template back into Dynamics 365

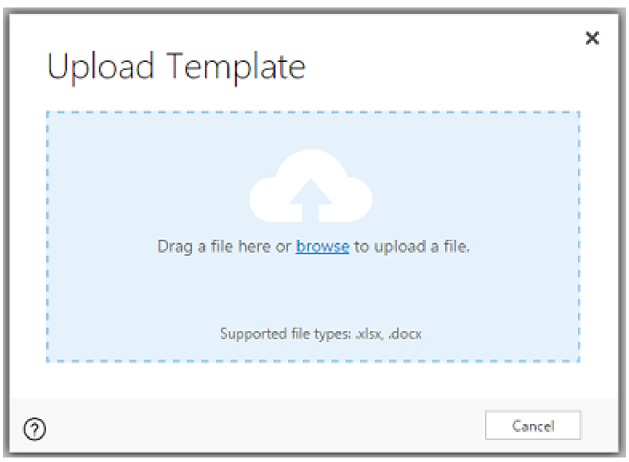
When you have your Word template built the way you want, save it so you can upload it into Dynamics 365.

Access to the newly created Word template depends on how you uploaded it and to the access granted to the security role. Be sure to check out Use Security Roles to control access to templates.

Dynamics 365 administrators can use the Settings page to upload the Word template into Dynamics 365. A template uploaded in Settings is available to all users in your Dynamics 365 organization.

**For admins: Upload the Word template into Dynamics 365**

1. In Dynamics 365, go to **Settings** > **Templates** > **Document Templates**.
2. Click **Upload Template**.
3. Drag the Word file in the dialog box or browse to the file.




4. Click **Upload**.

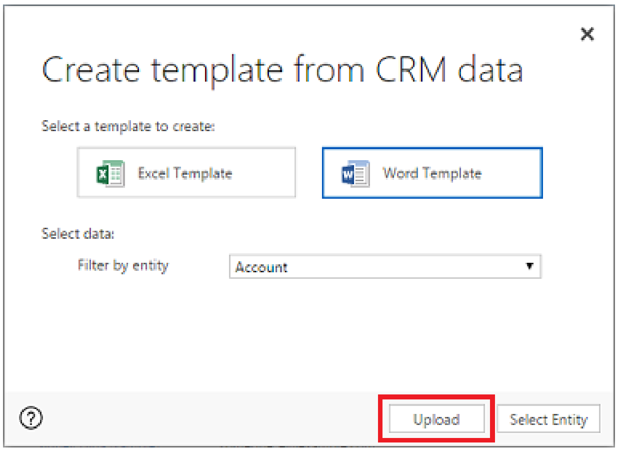
   Non-admin users can upload a template for their own use from a list of records.

**For non-admins or admins wanting to create a personal template: Upload the Word template into Dynamics 365**

1. In Dynamics 365, open a page with a list of records, for example, the list of customer accounts in Sales.

2. Select a single item such as an account, click **More** (...) > **Word Templates** > **Create Word Template**.

3. Click **Word Template** > **Upload**.




4. Drag the Word file in the dialog box or browse to the file.

5. Click **Upload**.

# Step 5: Generate a document from the Word template

To use the Word template you've created, do the following:

1. Open a record with information you want to create a document. For example, open a customer account record in Sales.

2. Click **More** (...) **> Word Templates**, and then under **Word Templates** select the template you created.

   If the template you created is not visible, there are two possibilities:

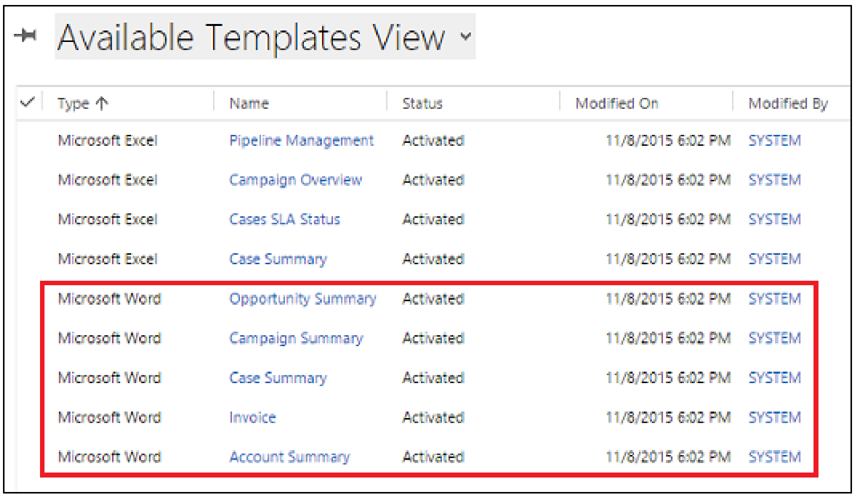
   a. Only templates built for the selected record type (entity) will be displayed. For example, if you open an opportunity record, you will not see a template you created with the Account entity.

   b. You need to refresh Dynamics 365 to see the template. Either refresh your browser or close and reopen Dynamics 365.

   After you select your Word template, Dynamics 365 creates a Word document from the record you selected.

### Try out the sample Word templates

There are five Word templates included with Microsoft Dynamics 365.



Available Templates View

| Type ↑ | Name | Status | Modified On | Modified By |
|---|---|---|---|---|
| Microsoft Excel | Pipeline Management | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Campaign Overview | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Cases SLA Status | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Excel | Case Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Opportunity Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Campaign Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Case Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Invoice | Activated | 11/8/2015 6:02 PM | SYSTEM |
| Microsoft Word | Account Summary | Activated | 11/8/2015 6:02 PM | SYSTEM |

The sample Word templates were created with a particular record type (entity). You'll only be able to apply the template to records of the same record type.

| NAME | ENTITY |
| --- | --- |
| Opportunity Summary | Opportunity (Sales area) |
| Campaign Summary | Campaign (Marketing area) |
| Case Summary | Case (Service area) |
| Invoice | Invoice (Sales area) |
| Account Summary | Client_Account (Sales, Service, and Marketing areas) |

**To apply a sample Word template**

1. Open a record with information with the entity type that matches the sample template. For example, open a customer account record in Sales to apply the Account Summary template.
2. Click **More** (**...**) **> Word Templates**, and then under **Word Templates** select the sample template.

   Open the newly-created Word template and give it a look.

> **NOTE**
> You can review but not edit templates that are included in Microsoft Dynamics 365.

# Additional considerations

**Use Security Roles to control access to templates**

Dynamics 365 administrators can control access to Word templates with some granularity. For example, you can give salespeople Read but not Write access to a Word template.

1. In Dynamics 365, click **Settings** > **Security** > **Security Roles**.
2. Select a role, and then click the Business Management tab.
3. Select **Document Template** to set access for templates available to the entire organization. Select **Personal Document Template** for templates shared to individual users.
4. Click the circles to adjust the level of access.


### Lists in created documents are not in the same order as records

Lists of records created from a custom template may not appear in the same order in Word documents as the order in Dynamics 365. Records are listed in the order of the time and date they were created.

### See also

Analyze your data with Excel templates

# Create a signature for your email or for a queue

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

Use an email signature in Dynamics 365 Customer Engagement to save time and be consistent in your responses. The owner of an email signature can be a user or a team.

## Create an email signature

To edit a signature if you are not a system administrator:

1. Click the **Settings** button in the upper-right corner of the screen.
2. Click **Options**, and then click the **Email Signatures** tab.

   To edit a signature if you are a system administrator:

3. Go to **Settings** > **Templates**.
4. Choose **Email Signatures**.

   To create a new email signature:

5. On the Actions toolbar, click **New**.
6. On the **Email Signature: New Email Signature** page, enter the following values:
   - **Owner:** The user or team that owns this signature.
   - **Language:** If you have multiple language packages installed, select the language for the signature you're composing.
   - **Title:** The title for this email signature.
7. Click **Set as Default** to make this the default email signature.
8. Click **Save and Close**.

## Using email signatures

If you have a default signature, when you create a new email in Dynamics 365 (for example, **Sales** > **Activities** > **Email**), an email signature is automatically added to the email based on the user you enter in the **From** field. An email signature must be defined for the user.

To change or add a signature, click **Insert Signature** on the menu bar on an email form.

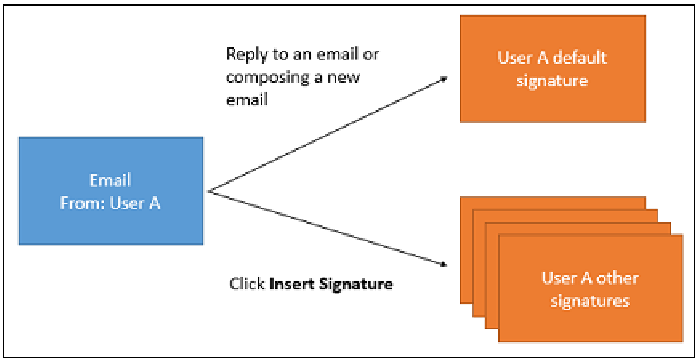
When you open the Email Signatures page, email signatures you own are displayed. Change the view to **All Email Signatures** to see signatures created by others.

## Things to know about email signatures

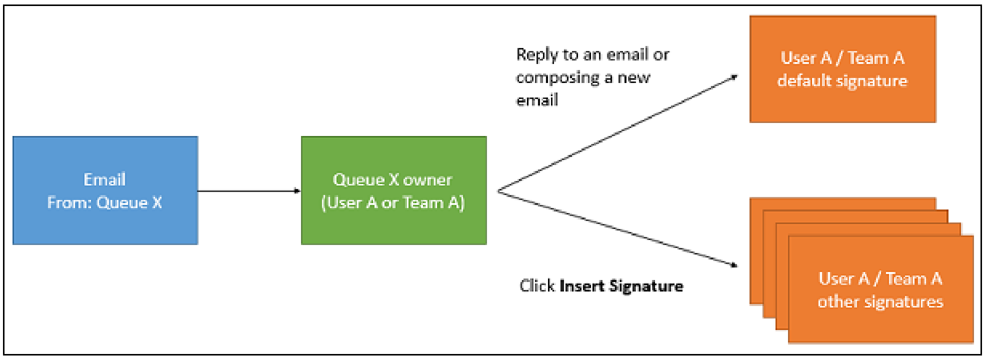
- The owner of an email signature can create, update, or delete it.
- Each user or team can have no more than one default email signature.
- When you change the owner of an email signature, the signature reverts to non-default. For example, a

signature is a default for user A. User A assigns it to queue X and queue X already has a default signature. The signature assigned will be non-default for queue X. If queue X does not have a default signature, the new signature will become the default signature.

- If the **From** field is changed to a user, the user email signature will appear. When you click**Insert Signature**, all the signatures that the user owns will appear. If the **From** field is changed to a queue, the default email signature of the owner of the queue will appear. The owner of a queue can be a user or a team. When you click **Insert Signature**, all the email signatures that are owned by the queue owner (user or a team) will appear.




- If the **From** field is changed to a queue, the default email signature of the owner of the queue will appear. The owner of a queue can be a user or a team. When you click **Insert Signature**, all the email signatures that are owned by the queue owner (user or a team) will appear.




## See also

[Work with templates]

# Extend Dynamics 365 Customer Engagement

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 Customer Engagement is a very powerful business tool right out of the box. It becomes even more so when you extend it by:

1. Integrating Dynamics 365 with your email system such as Exchange Online or Gmail.
2. Adding solutions by Microsoft like Office 365 Groups or solutions from other companies.
3. Integrating with Office 365 features such as SharePoint, Skype, OneDrive, or OneNote.

# Integrate (synchronize) your email system

9/26/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

One of the main reasons people use Dynamics 365 is to store all customer communications in one place, so anyone with the appropriate permissions can see all relevant customer records. For example, view all email associated with a particular contact, account, opportunity, or case.

To store email and other messaging records in Dynamics 365, you need to synchronize your email system with Dynamics 365. You can do this with server-side synchronization.

> **IMPORTANT**
>
> - In previous versions of Dynamics CRM, you could also use the Email Router to synchronize records. The Email Router has been deprecated as of the Dynamics 365 (online), version 9.0. We strongly recommend that you migrate all email routing functionality to use server-side synchronization. More information: Migrate settings from the Email Router to server-side synchronization
> - Internet Message Access Protocol (IMAP) email servers are not currently supported by server-side synchronization or the Email Router.
> - As of 1/29/2018, based on overwhelming customer feedback and our desire to continue supporting our customers, we have **decided not to deprecate Dynamics 365 for Outlook** (Outlook add-in). Please read this blog post for more details.

## Using server-side synchronization

Server-side synchronization has these benefits:

- **Enables Dynamics 365 App for Outlook**. With Dynamics 365 App for Outlook, Dynamics 365 information appears next to a user's Outlook email messages or appointments. They can view information about contacts and leads stored in Dynamics 365 and add Dynamics 365 contacts directly from an email message. They can also link email, appointment, and contact records to new or existing Dynamics 365 records, such as opportunity, account, or case records. Dynamics 365 App for Outlook is very simple to deploy and it works with Outlook on the web (included in Office 365) the Outlook desktop client, and Outlook mobile. Learn more about Dynamics 365 App for Outlook.
- **Enables Exchange folder tracking**. With folder tracking, users can simply drag email to an Exchange folder to track it automatically in Dynamics 365. Folder tracking works on any mobile device that supports Microsoft Exchange, which means users can track email from just about any device. Learn more about folder tracking.
- **Automatic synchronization**. When you synchronize records with server-side synchronization, the synchronization happens automatically at the server level.
- **Enables multiple scenarios, including hybrid scenarios**. You can use server-side synchronization to connect:
  - Dynamics 365 (online) to Exchange Online
  - Dynamics 365 (online) to Exchange Server (on-premises)

    - Dynamics 365 Server (on-premises) to Exchange Server (on-premises)
    - Dynamics 365 Server (on-premises) to Exchange Online

- **Synchronize appointments, contacts, and tasks**. In addition to email, you can synchronize Outlook appointments, contacts, and tasks.
- **Synchronize with POP3 email servers**. You can use server-side synchronization to synchronize Dynamics 365 with Gmail, Outlook.com, Yahoo, and other POP3 email servers. Note, however, that you can't synchronize appointments, contacts, and tasks with POP3 email servers.
- **Integrated mailbox management and resource utilization**. You can use the server-side synchronization performance dashboard to quickly monitor mailbox performance across the organization. You can also troubleshoot errors through error logging and reporting.

More information: Integrate your email system using server-side synchronization

> **NOTE**
>
> If you use server-side sync in Dynamics 365, you won't be able to view S/MIME encrypted messages. Encrypting emails with S/MIME requires an application to use an S/MIME control which server-side sync does not support. For more information on S/MIME encryption, see Encrypt messages by using S/MIME in Outlook Web App.

**See also**

Microsoft Dynamics CRM: How it works documentation

Integrate your email system using server-side synchronization

Troubleshooting and monitoring server-side synchronization issues

Deploy Dynamics 365 App for Outlook

Migrate settings from the Email Router to server-side synchronization

# Deploy Dynamics 365 App for Outlook

10/30/2018 • 12 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

**IMPORTANT**

The latest release of Dynamics 365 App for Outlook, works with Dynamics 365 (online), version 9.0 or later only.

Delegated users can not use Dynamics 365 App for Outlook to track emails.

Multi-factor authentication with Dynamics 365 App for Outlook is not a supported scenario.

People can use Dynamics 365 App for Outlook to tap the power of Dynamics 365 while using Outlook on the desktop, web, or tablet. For example, view information about email or appointment recipients, or link an Outlook email or appointment to a Dynamics 365 record such as an opportunity, account, or case. To learn more about what Dynamics 365 App for Outlook offers, see the Dynamics 365 App for Outlook User Guide.

## Known issues

For known issues with this version of Dynamics 365 App for Outlook, see the Dynamics 365 Customer Engagement Readme.

There are two ways to install Microsoft Office: using a Windows Installer (MSI) version or a Click-to-Run (C2R) version of Office. You might have issues accessing Dynamics 365 in the Add-ins area of Outlook if you don't have the necessary updates for your installation version. For more information, see Issue when trying to access Dynamics 365 within the Add-ins area of Outlook.

The Outlook App is not enabled on Common Data Service for Apps 2.0.

## Requirements

The following are required to use Dynamics 365 App for Outlook:

| | |
|---|---|
| **Email Server** | • Exchange Server 2013 CU 14 or greater<br>• Exchange Server 2016<br>• Exchange Online |
| **Email client** | • Outlook 2016 (MSI) version 16.0.4266.1001 or higher (on Windows 8.1 or higher client OS)<br>• Outlook 2016 (C2R) version 16.0.93330.2073 or higher (on Windows 8.1 or higher client OS)<br>• Outlook 2013 (MSI) version 15.0.5023.1000 (on Windows 8.1 or higher client OS)<br>• Outlook 2016 for Mac<br>• Outlook for iOS (Apple iPhone 6S or higher, running iOS version 8 or higher)<br>• Outlook for Android (with Exchange Online, on Android phones running Android 4.4, 5.0, 6.0, or 7.0)<br><br>**Note:** Support for 2013 versions of Office 365 ProPlus ended February 28, 2017 |
| **Browser (Outlook Web Access)** | • Microsoft Edge (with Exchange on premise 2016 or higher and Exchange Online)<br>• Internet Explorer 11 (with Exchange on premise 2016 or higher and Exchange Online)<br>• Google Chrome<br>• Mozilla Firefox |

> **NOTE**
>
> Support for 2013 versions of Office 365 ProPlus ends February 28, 2017. More information: See here.

- Dynamics 365 (online), version 9.0 or later
- Synchronization of incoming email through server-side synchronization. More information: Set up server-side synchronization of email, appointments, contacts, and tasks
- Dynamics 365 App for Outlook is an Outlook add-in that uses Exchange Web Services (EWS) to interact with Microsoft Exchange. This requires OAuth be enabled on Microsoft Exchange. For more information regarding this dependency, see Authentication and permission considerations for the makeEwsRequestAsync method.
- Required privileges as described below

> **NOTE**
>
> Supported configurations and requirements for Dynamics 365 features are listed throughout our documentation. Specific configurations not documented should be considered unsupported.

### Required privileges

Dynamics 365 provides access to Dynamics 365 App for Outlook through the **Use Dynamics 365 App for Outlook** privilege. If a user doesn't have this privilege, they'll receive the following error:

"You haven't been authorized to use this app. Check with your system administrator to update your settings."

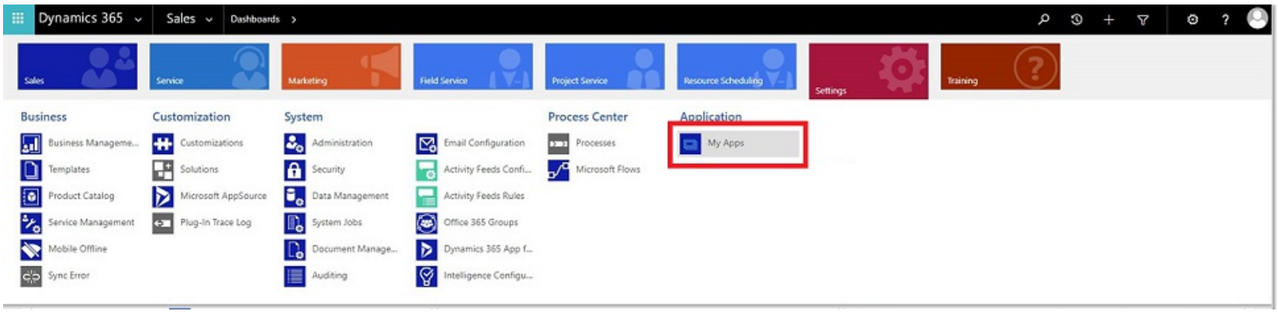
#### Set the right privileges for the security role assigned to the user accessing Dynamics 365 App for Outlook

1. Go to **Settings** > **Security**.
2. Click **Security Roles**.
3. Choose a security role.
4. In the **Business Management** tab, verify that **Mailbox** has **read/write** privileges. In the **Privacy Related Privileges** section, verify that **Use Dynamics 365 App for Outlook** is set to **Organization**. If not, click **Use Dynamics 365 App for Outlook**.
5. In the **Customization** tab, verify that **User Application Metadata** has **read/write** privileges. Also verify that **Entity**, **Field**, **Model-driven App**, **Relationship**, **System Application Metadata**, **System Form** and **View** have **read** privilege.

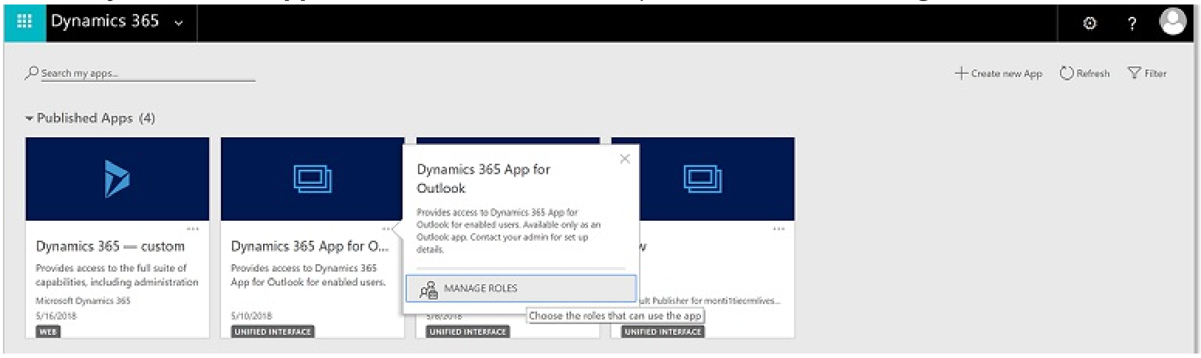
### Provide security role access

If you have custom security roles defined in Dynamics 365, users who have that security role assigned may not be able to access Dynamics 365 App for Outlook. In addition to the custom security role containing required privileges for App for Outlook, the security role needs to be bound to the App for Outlook App. In order to achieve this, follow the steps below:

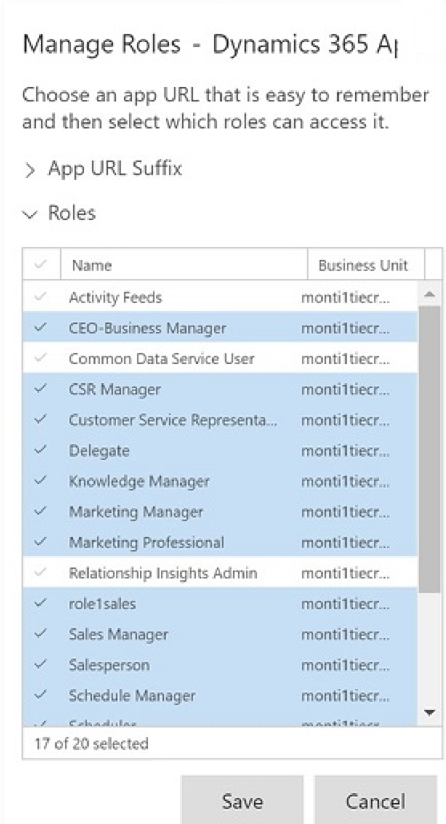
1. From the main menu navigate to **Settings** > **My Apps**. (If you do not see **My Apps** section, you can navigate to **My Apps** page by going to **<your_organization_URL>/tools/AppModuleContainer/applandingtilepage.aspx**)




2. On the **Dynamics 365 App for Outlook** tile click the ellipsis and then click **Manage Roles**.




3. In the flyout that appears on the right, select the security roles to have access to App for Outlook and




choose **Save**.

### Supported configurations with Microsoft Exchange

As of the December 2016 Update for Dynamics 365 (online and on-premises) you can use the app with any combination of Dynamics 365 (online) or Dynamics 365 (on-premises) and Exchange Online or Exchange Server (on-premises), including hybrid configurations. This means you can use Dynamics 365 App for Outlook in any of the following configurations:

| | |
|---|---|
| Dynamics 365 (online) | Exchange Online |

| | |
|---|---|
| Dynamics 365 (online) | Exchange Server (on-premises), version 15.0.1236.3.32 (Cumulative Update 14 for Exchange Server 2013) or greater |
| Dynamics 365 (on-premises) | Exchange Server (on-premises), version 15.0.1236.3.32 (Cumulative Update 14 for Exchange Server 2013) or greater |
| Dynamics 365 (on-premises) | Exchange Online |

**Feature support per client**

| | | | | |
|---|---|---|---|---|
| | Received email (view information and track) | Compose email (view information, track, and add templates, knowledge base articles, and sales literature) | Appointments and meetings (view information and track) | Contacts (view information and track) |
| Outlook 2016 (desktop client) | O and M | O and M[1] | O and M[1] | O[3] and M[2] |
| Outlook 2013 (desktop client) | O and M | O and M[1] | O and M[1] | |
| Outlook for Mac (desktop client) | O and M | | | |
| Outlook on the web (OWA) | O and M | O and M[1] | O and M[1] | |
| Mobile Outlook app[4] | O | | | |

(O)nline: Dynamics 365 (online), Exchange Online
(M)ixed: Dynamics 365 (online), Exchange Server 2013/2016

Note: Dynamics 365, version 9 is not available on-premises.

(1) Tracking email in compose mode and tracking appointments requires Exchange Server 2013 CU14 or Exchange Server 2016.

(2) Tracking contacts is supported only on Exchange Server 2016 CU3 and Outlook 2016 16.0.6741.1000 C2R version or later. Or, Outlook 2016 MSI version 16.0.4444.1000 or higher with the following KBs installed. For more information, see these KB articles:

- KB3118330
- KB3118374
- KB3118375
- KB3115500

(3) Supported only on Outlook 2016 16.0.7426.1049 or later.

(4) Supported on iPhones 6S or higher, with iOS 8 or higher.

**Supported browsers for Outlook on the web**

You can use Dynamics 365 App for Outlook with Outlook on the web on the following browsers:

- Internet Explorer 11, or Microsoft Edge

  The following configuration is supported:

  - Protected Mode is enabled for **Internet** security zone. To enable Protected Mode: in IE 11, go to **Tools** > **Internet options** > **Security tab** > **Internet**.
  - Protected Mode is enabled for **Local intranet** security zone. To enable Protected Mode: in IE 11, go to **Tools** > **Internet options** > **Security tab** > **Local Internet**.
  - Your Dynamics 365 URL is in the **Local intranet** security zone list of trusted websites. In IE 11, go to **Tools** > **Internet options** > **Security tab** > **Local intranet** > **Sites** > **Advanced**.

- Google Chrome (latest version) on Windows
- Firefox (latest version) on Window
- Apple Safari (version 9 or version 10) on Mac or on OSX

### Supported servers

The server requirements for using Office Add-ins are Exchange Server 2013, Exchange Server 2016, or Exchange Online.

### Supported languages

Dynamics 365 App for Outlook supports the following languages:

| | | |
|---|---|---|
| Bulgarian (Bulgaria) - 1026 | Hebrew - 1037 | Portuguese (Brazil) - 1046 |
| Chinese (People's Republic of China) - 2052 | Hindi (India) - 1081 | Portuguese (Portugal) - 2070 |
| Chinese (Taiwan) - 1028 | Hungarian - 1038 | Romanian - 1048 |
| Croatian (Croatia) - 1050 | Indonesian - 1057 | Russian - 1049 |
| Czech (Czech Republic) - 1029 | Italian - 1040 | Serbian - 2074 |
| Danish - 1030 | Japanese - 1041 | Slovak - 1051 |
| Dutch - 1043 | Kazakh - 1087 | Slovenian - 1060 |
| English - 1033 | Korean - 1042 | Spanish - 3082 |
| Estonian - 1061 | Latvian - 1062 | Swedish - 1053 |
| Finnish - 1035 | Lithuanian - 1063 | Thai - 1054 |
| French - 1036 | Malaysian - 1086 | Turkish - 1055 |
| German - 1031 | Norwegian - 1044 | Ukrainian - 1058 |
| Greek - 1032 | Polish - 1045 | Vietnamese - 1066 |

# Deploy Dynamics 365 App for Outlook

After setting up server-side synchronization and setting the required privileges, you can push Dynamics 365 App for Outlook to some or all users, or you can have users install it themselves as needed.

**To push the app to users**

1. Go to **Settings** > **Dynamics 365 App for Outlook**.

2. In the **Getting Started with Dynamics 365 App for Outlook** screen, under **Add for Eligible Users** (you may have to click **Settings** if you're opening this screen for the second or subsequent time), select the **Automatically add the app to Outlook** check box if you want to have users get the app automatically. If a user has the required privileges and email is synchronized through server-side synchronization, you won't have to do anything more to push the app to them. For example, if you add the required privileges to the Salesperson role, and then assign this role to a new user, they'll automatically get the app.

3. Do one of the following:

   - To push the app to all eligible users, click **Add App for All Eligible Users**.

   - To push the app to certain users, select those users in the list, and then click **Add App to Outlook**.

   > **TIP**
   > If the list shows that a user is pending or hasn't been added, you can click the **Learn more** link next to the user to find more information about status.

4. When you're done, click **Save**.

**To have users install the app themselves**

1. Users click the **Settings** button , and then click **Apps for Dynamics 365**.

2. In the **Apps for Dynamics 365** screen, under **Dynamics 365 App for Outlook**, users click **Add app to Outlook**.

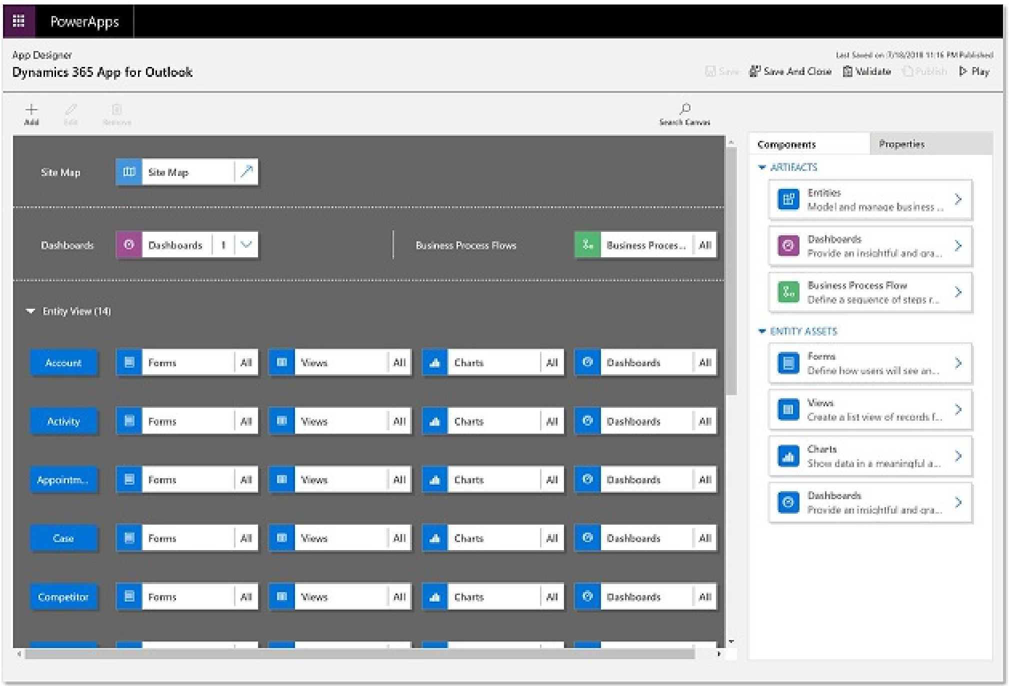
> **NOTE**
> Users can also disable or remove the add-in themselves, if needed. For more information, see the Dynamics 365 App for Outlook User's Guide.

# Filter entities and views that appear in Dynamics 365 App for Outlook

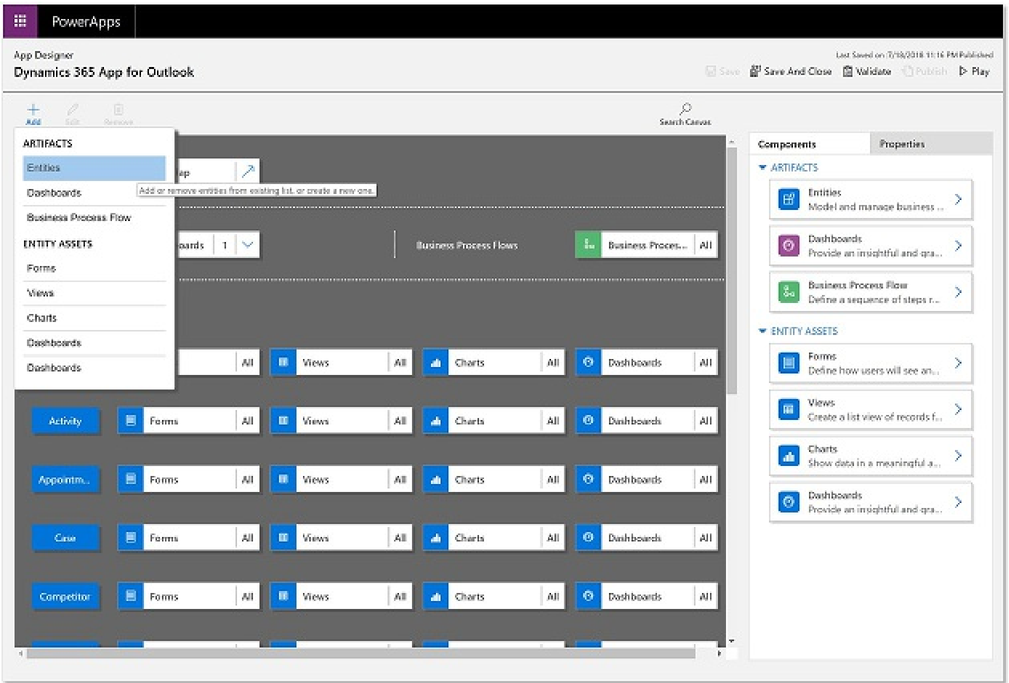
If you are a system administrator or a customizer, you can choose to expose only the required set of entities to be available to Dynamics 365 App for Outlook.You can do this through App Modules.

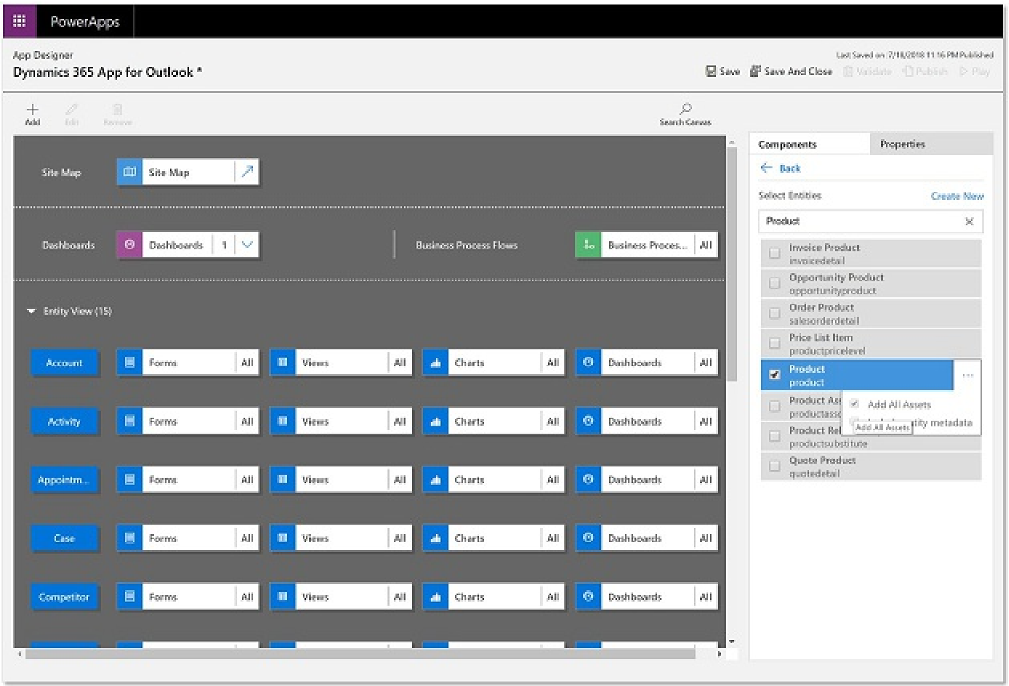
With the PowerApps App Designer, you can control the specific entities that appear in Dynamics 365 App for Outlook's **Quick Create** menu and the **Regarding** lookup. This helps you get to the record you are looking for faster and also modularize business logic by exposing only the relevant entities for your users in Dynamics 365 App for Outlook.

1. From the main menu navigate to **Settings** > **Customizations** > **Customize the System** > **Apps**.
2. Double-click **Dynamics 365 App for Outlook** to open the App Designer

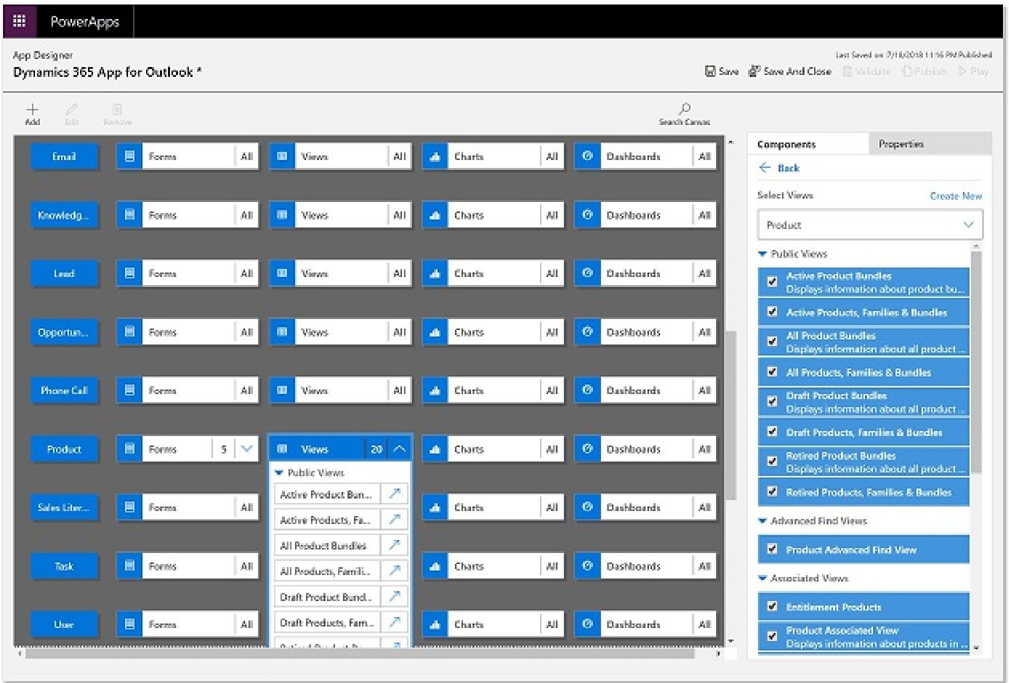



3. Choose **Add** > **Entities** and then select the entity you want to add and complete the addition by including all assets.






4. Review the list of Views that are available for the entity and deselect the ones you do not want to be available in Dynamics 365 App for Outlook. In Dynamics 365 App for Outlook **Regarding** lookup, you can filter results based on an entity and further, on one of the views defined for that entity.




5. Save your changes and publish the customization.

> **NOTE**
>
> - You can also remove entities from Dynamics 365 App for Outlook.
> - An entity must be Activities enabled for it to appear in the Regarding lookup. See Enable a custom entity to appear in the Regarding lookup.

## Troubleshooting installation problems

1. If you don't see Dynamics 365 App for Outlook when you click the **Settings** button, check that you've enabled the feature. See Enable.

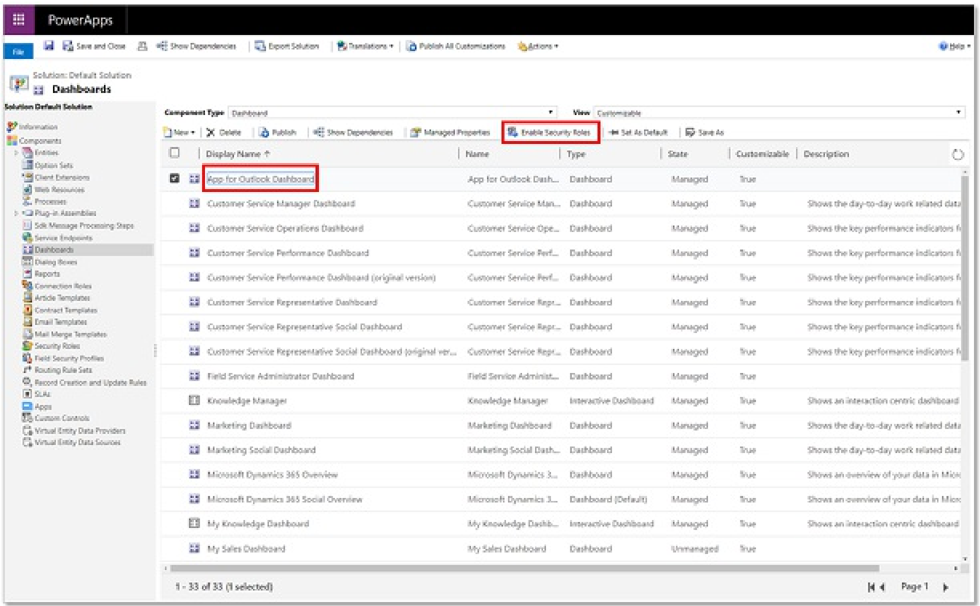
2. If you or your users have trouble installing Dynamics 365 App for Outlook, it may be because their Exchange mailbox is currently linked to another Dynamics 365 organization. An Exchange mailbox (email address) can only synchronize appointments, contacts, and tasks with one organization, and a user that belongs to that organization can only synchronize appointments, contacts, and tasks with one Exchange mailbox. You can overwrite the setting stored in Exchange if you want to change the primary synchronizing organization. For more information, see this KB article.

# Limitations

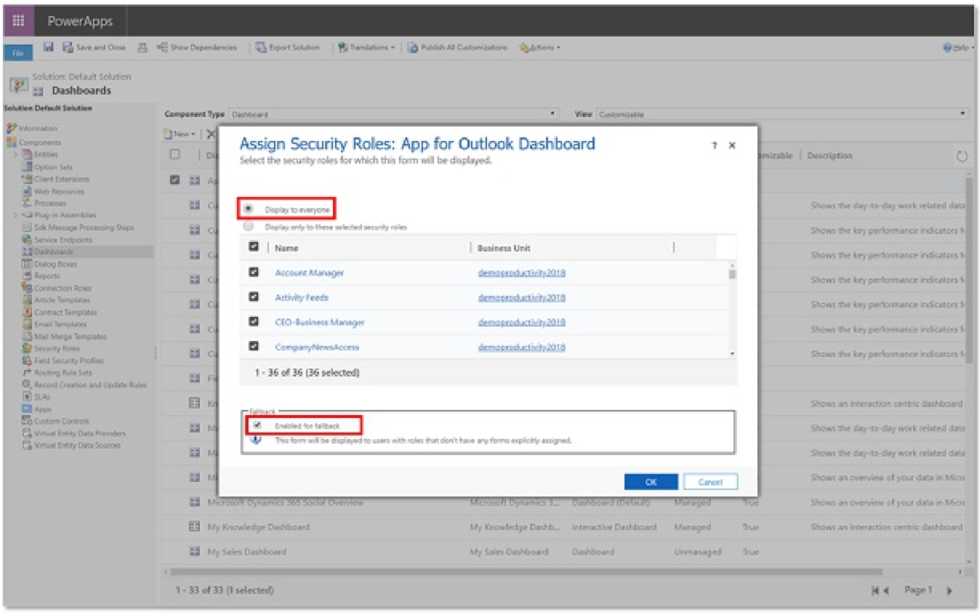
**Customizing App for Outlook sitemap**

System customizers have access to the Sitemap Designer (within the App Designer) for Dynamics 365 App for Outlook. It is one of the App Modules in version 9.0. The Dynamics 365 App for Outlook default landing page is a dashboard that is configured in the App Module. Customizations to App for Outlook sitemap are not supported at this time. If you are unable to view the Dynamics 365 App for Outlook landing page when you open App for Outlook, please follow the steps below.

1. Navigate to **Settings** > **Customizations** > **Customize the system**.
2. From the menu on the left, expand **Components** and then select **Dashboards**.
3. Select **App for Outlook Dashboard** and then select **Enable Security Roles**.



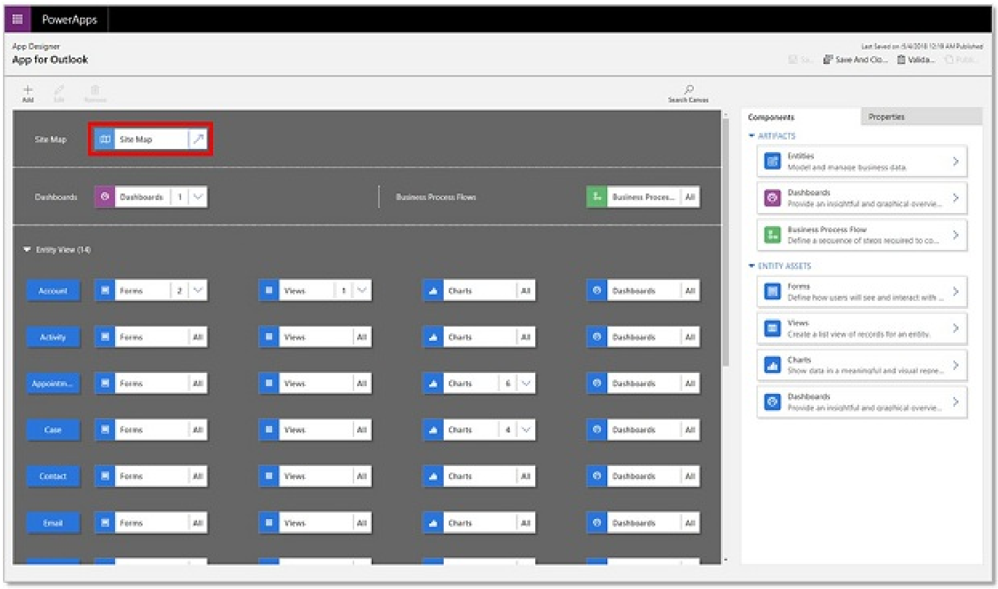
4. On the **Assign Sercity Roles: App for Outlook Dashboard** box select **Display to everyone** and **Enable for Fallback**.



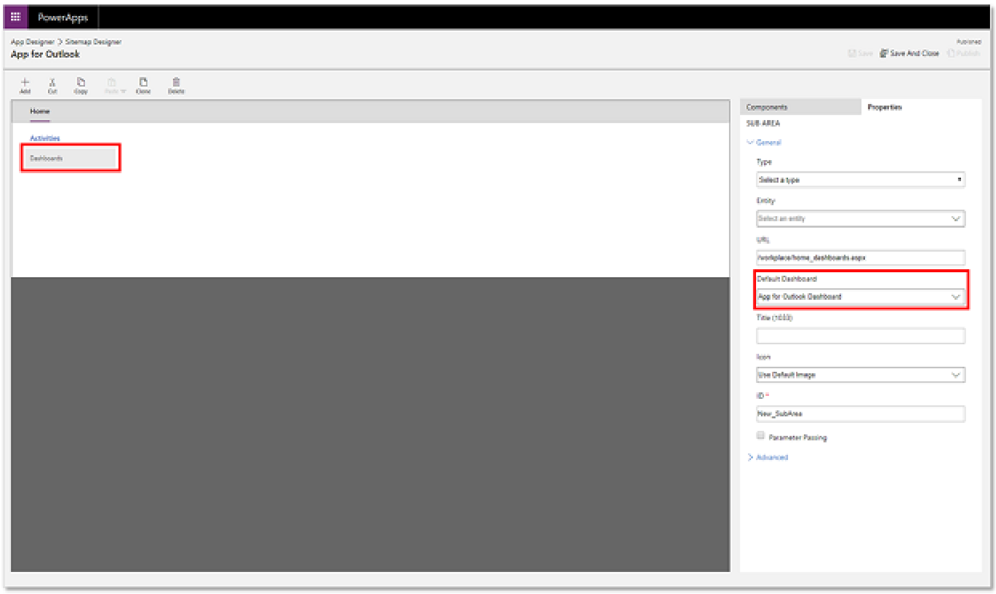

5. Select **OK**.

This issue is also seen when the sitemap for App for Outlook has been modified i.e. the sitemap for App for Outlook has an alternate dashboard in the **Default Dashboard** field. To resolve this issue, do the following:

1. Open App for Outlook sitemap designer. Go to **Settings** > **Customizations** > **Customize the system** > **Apps** > **App for Outlook**.



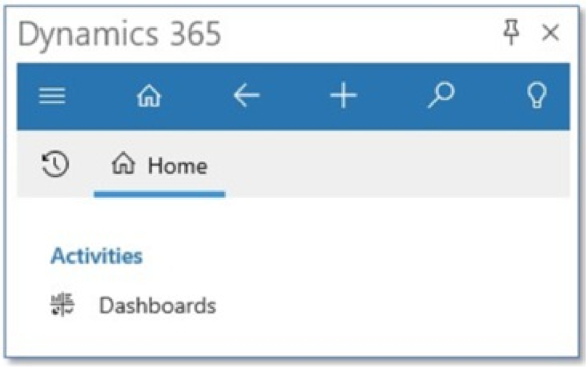

2. Make sure that the App for Outlook sitemap has **Dashboard** as the first sub area and that the default dashboard is **App for Outlook Dashboard**.




**Dashboard customization in Dynamics 365 App for Outlook**

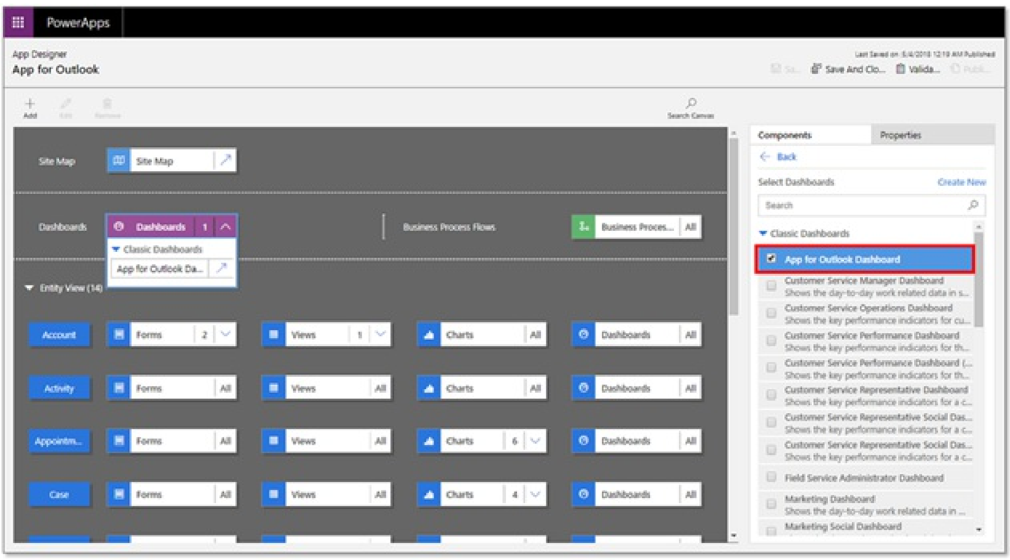
The following dashboard customizations are not supported currently.

- In Dynamics 365 App for Outlook, you will not be able to switch dashboards by navigating to the main menu and then **Home**. Choosing the Dashboards option will redirect back to the default App for Outlook dashboard.




- Switching the default dashboard for App for Outlook in App designer

  System customizers have access to the App Designer for Dynamics 365 App for Outlook as it is one of the App Modules in version 9.0. We recommend that you do not change the default App for Outlook dashboard as that is not a supported.



## Explore the User's Guide and train your users

To learn how to use Dynamics 365 App for Outlook, see the Dynamics 365 App for Outlook User's Guide.

**See also**

Dynamics 365 App for Outlook User Guide
Read more details about supported clients in this blog: Dynamics 365 App for Outlook Support Matrix
Set up server-side synchronization of email, appointments, contacts, and tasks

# Enable accessible email flow

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

To improve accessibility when reading and editing email in Dynamics 365 (online), we're introducing an app that provides an accessible email flow. This topic explains how admins can enable this flow and how end users can access it.

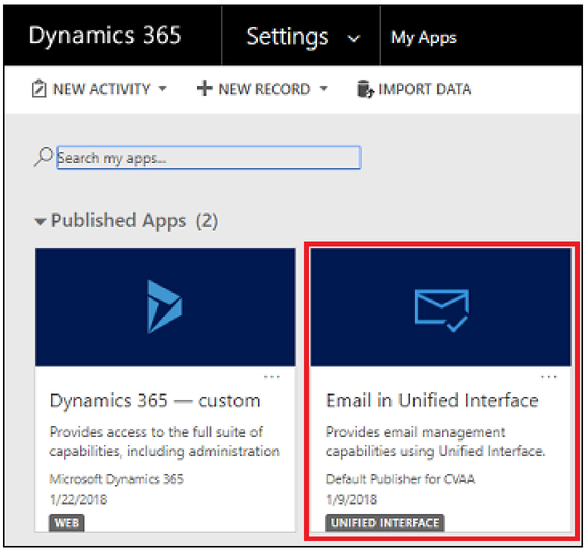
## For admins: Install the app

Follow these steps to deploy the solution and enable users to use the accessible flow.

**Install the app**

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can also sign in with Dynamics 365 system administrator or delegated admin security roles.
2. Select **Admin centers** > **Dynamics 365**.
3. Select the **Instances** tab, select the instance to add the app to, and then select **Manage your solutions**.
4. Select the **Email in Unified Interface** app, and then select **Install**.

You can now see the app in the list of published apps. Go to **Settings** > **My Apps** to see it.




**Provide users with permissions for the accessible email access flow**

For users who want to have accessible email access, follow these steps.

1. Go to **Settings** > **Security** > **Users**.
2. In the list, select the user or users that you want to assign a security role to.
3. Select **Manage Roles**.

   Only the security roles available for a user's business unit are displayed.
4. In the **Manage User Roles** dialog box, select the **Email app access role** security role, and then select **OK**.

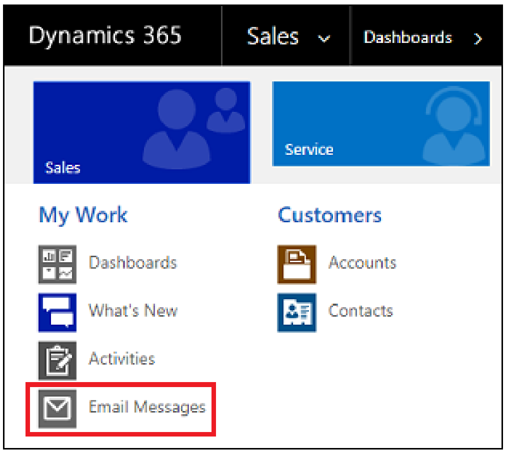
**Notify users**

Once the app is installed, notify users that they need to reload the web application to see and use the accessible email flow.

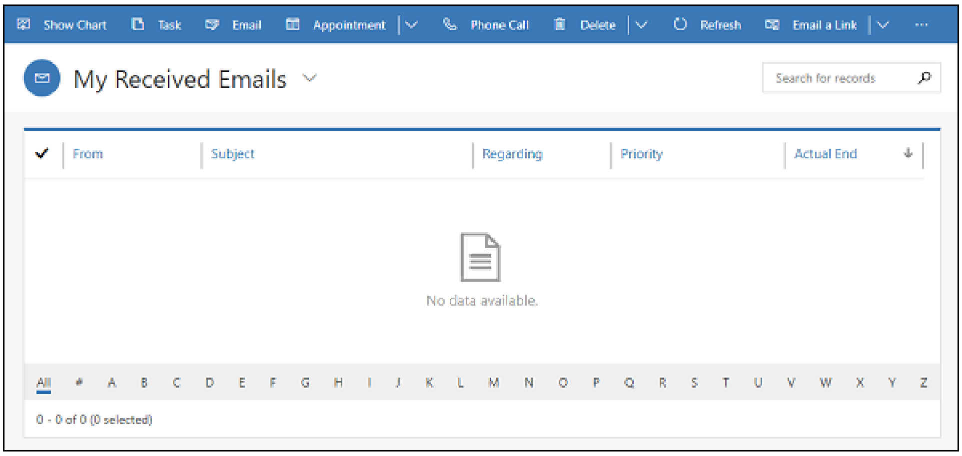
## For end users: Use the accessible email flow

Users with the **Email app access role**, go to **Sales**, **Service**, or **Marketing**. Select **Email Messages** to open emails.

> **NOTE**
> - If you don't see **Sales**, **Service**, or **Marketing**, your Dynamics 365 has been customized. Talk to your administrator or customizer.
> - **Email Messages** will not appear if **Activities** has been customized to not be included in the sitemap.




Here, you can read and manage your emails in the Email in Unified Interface app.




### See also

[Accessibility for people with disabilities](#)
[Find your way around Dynamics 365 Customer Engagement apps](#)

# Server-side synchronization

10/10/2018 • 3 minutes to read • Edit Online

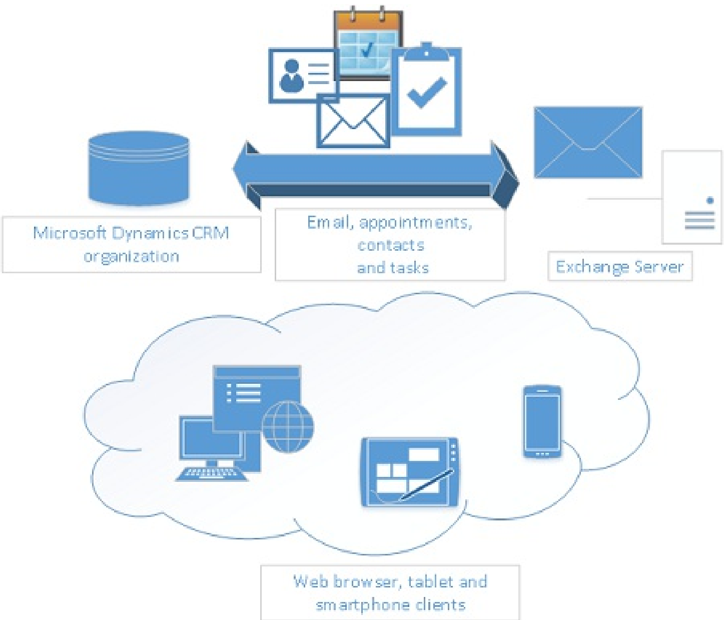
Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Server-side synchronization is the preferred option for organizations with users who run Dynamics 365 in a web browser or on a mobile device, such as a tablet or smartphone. server-side synchronization provides direct Dynamics 365-to-email server synchronization. When you use Exchange, this includes bi-directional synchronization of email, contacts, tasks, and appointments. The data synchronized for each user can be controlled by using synchronization filters that are available from the **Synchronization** tab in the Dynamics 365 user options dialog.

If you use a POP3 email server, the data that is synchronized includes email only.

Using server-side synchronization makes messaging data available to a web browser, tablet, or smartphone that is running Dynamics 365.

For more information about server-side synchronization, see Server-side synchronization of email, appointments, contacts, and tasks.




> **NOTE**
> A Dynamics 365 user can only map to a single Exchange or POP3 mailbox. Similarly, an Exchange or POP3 mailbox can only be mapped to a single Dynamics 365 user. When Dynamics 365 detects that an Exchange or POP3 mailbox has already been mapped to a Dynamics 365 user, a dialog box is displayed to present a choice to the user whether to map the Dynamics 365 user to the Exchange mailbox. When the user selects yes, it breaks the previous Dynamics 365 user to Exchange mailbox mapping and subsequently the synchronization that would occur between the Dynamics 365 user and the Exchange mailbox.

## Server-side synchronization frequency

When synchronization by using server-side synchronization occurs, the process is dynamic and unique for each user's mailbox. The synchronization algorithm ensures that mailboxes are synced according to dynamic parameters such as the number of email messages and the activity within the mailbox. Normally, email synchronization occurs every 5 minutes. When a mailbox has many email messages, the interval can be reduced dynamically to 2 minutes. If the mailbox is less active, the interval can be increased up to 12 minutes. Generally speaking, you can assume that a mailbox will be synced at least once every 12 minutes. Note that you can't manually synchronize records through server-side synchronization and when you track email (**Track** button), this occurs immediately.

## Features available with server-side synchronization in Dynamics 365 (online)

Some features offered by server-side synchronization include the following:

1. **Email folder tracking.** You can simply drag email to a folder to track it. Folder tracking works on any mobile device that supports Microsoft Exchange, which means you can track email from just about any device.

2. **Doesn't require Outlook.** You don't have to have the Dynamics 365 for Outlook add-in open to synchronize records. You can still use Dynamics 365 for Outlook to track records manually even if you do the synchronization through server-side sync. This also helps to boost the performance of the Outlook add-in.

3. **Support for Dynamics 365 App for Outlook.** You can track incoming email with the new Dynamics 365 App for Outlook. Dynamics 365 App for Outlook works with Outlook on the web. So all you need is a browser to track incoming email.

## Features available with server-side synchronization in both Microsoft Dynamics 365 (online) and Microsoft Dynamics 365 (on-premises)

Some features offered by server-side synchronization include the following:

- **Efficient resource utilization.** server-side synchronization provides integrated mailbox management. You can disable inactive mailboxes that have permanent errors. It prevents resource hogging by applying an upper limit on the allocated capacity and time-out requests.

- **Connection throttling.** server-side synchronization provides a way to control the number of parallel connections opened against an email server to prevent overloading the mail server.

- **Data migration.** server-side synchronization supports migrating configuration data from Email Router to server-side synchronization by using the migration wizard. More information: Migrate settings from the Email Router to server-side synchronization.

- **Service isolation.** server-side synchronization has separate queue-management and configuration settings for asynchronous operations, outgoing activities, and mailboxes. It is based off asynchronous service architecture and may share the same process. In all cases, it manages server resources while maintaining isolation with the asynchronous service.

- **Error reporting for users and administrators.** server-side synchronization supports logging and reporting of errors specific to an email or one or more mailboxes. More information: Error Logging for Server-Side Synchronization.

> **NOTE**
>
> In Dynamics 365, you can synchronize emails using Dynamics 365 for Outlook or server-side synchronization. If server-side synchronization is selected, the synchronization does not require running Dynamics 365 for Outlook. You will, however, still need Dynamics 365 for Outlook to promote an item from Outlook.

**See also**

Set up server-side synchronization of email, appointments, contacts, and tasks

Synchronizing data with Outlook or Exchange FAQ

# Supported email service configurations for server-side synchronization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Depending on your Dynamics 365 installation, you may be deciding whether to use server-side synchronization or the Email Router/Outlook synchronization. This following table lists what is supported by server-side synchronization for each type of installation. Later in this topic, you can read about the scenarios that aren't supported by server-side synchronization.

**IMPORTANT**

- The information here includes the POP3/SMTP systems supported by Microsoft. Although other POP3/SMTP systems might work with Dynamics 365 (on-premises), those systems were not tested by Microsoft and are not supported.
- Outlook on the web is not supported in a hybrid deployment: Dynamics 365 (on-premises) with Exchange Online.
- You can create two different email server profiles: one for online mailboxes, and another for on-premises mailboxes. Associate the mailboxes with the correct email server profile.
- Manual tracking in Dynamics 365 for Outlook is not supported when a user's mailbox is configured to use server-side synchronization with the POP/SMTP protocol.
- For Dynamics CRM Online 2016 Update 1 and December 2016 Update for Dynamics 365 (online), we support service encryption in Exchange Online with server-side sync.

| DYNAMICS 365 DEPLOYMENT | EMAIL SYSTEM | EMAIL SYNCHRONIZATION | APPOINTMENTS, CONTACTS, AND TASKS SYNCHRONIZATION | PROTOCOL |
|---|---|---|---|---|
| Dynamics 365 (online) | 1. Exchange Online<br>2. Exchange Server 2010 SP3<br>3. Exchange Server 2013 SP1<br>4. Exchange Server 2016 | Yes | Yes | Exchange Web Services |
| Dynamics 365 (online) | - Gmail<br>- Yahoo! Mail | Yes | No | POP3/SMTP |
| Dynamics 365 (on-premises) | - Exchange Online<br>- Exchange Server 2010<br>- Exchange Server 2013<br>- Exchange Server 2016 | Yes | Yes | Exchange Web Services |
| Dynamics 365 (on-premises) | - Gmail<br>- Yahoo! Mail<br>- MSN[1]<br>- Outlook.com[1]<br>- Windows Live Mail[1] | Yes | No | POP3/SMTP |

[1] May be unsupported for FIPS-compliancy. See the following section for more information.

## Using Exchange Online with Dynamics 365 (online)

If your company is using Exchange Online with Dynamics 365 (online), note the following:

Dynamics 365 (online) supports server-side synchronization with Exchange Online in the same tenant in Office 365 with Server to Server Authentication. Other authentication methods or settings are not recommended or supported, including:

- Using credentials specified by a user or queue
- Using credentials specified in an email server profile
- Using Impersonation
- Setting Auto Discover Server Location to No
- Using an email server profile other than Exchange Online
- Connecting Dynamics 365 (online) with Exchange Online in different tenant is not supported.

## Unsupported email service configurations

Server-side synchronization doesn't support the following scenarios:

- Mix of Exchange/SMTP and POP3/Exchange
- Creation of mass email marketing campaigns
- Extensibility scenarios like extending EWS/POP3/SMTP protocols and creating custom email providers
- Exchange Server 2003 and Exchange Server 2007
- Server-side synchronization in Dynamics 365 (online), or in a Dynamics 365 (on premises) deployment that is configured for FIPS 140-2 compliancy, requires a POP3/SMTP email server that is also FIPS 140-2 compliant. Some email servers are not FIPS 140-2 compliant, such as MSN, Outlook.com, or Windows Live Mail.
- Multi-factor authentication isn't supported for Dynamics 365 (online) to Exchange Server (on-premises), and Dynamics 365 (on-premises) to Exchange Online.

For most situations not supported by server-side synchronization, you can use the Microsoft Dynamics CRM Email Router. More information: Integrate your email system with Dynamics 365

> **NOTE**
> We recommend that you don't use a mixed configuration of Outlook synchronization and server-side synchronization for appointments, contacts, and tasks in the same organization, because it may result in updated Dynamics 365 data not synchronizing to all attendees.

**See also**

Server-side synchronization
Set up server-side synchronization of email, appointments, contacts, and tasks

# Set up server-side synchronization of email, appointments, contacts, and tasks

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use server-side synchronization to synchronize your email system with Dynamics 365 (online) at the server level. For example, you can synchronize Dynamics 365 (online) with Microsoft Exchange Online (hosted email server) or Microsoft Exchange Server (on-premises). If you synchronize Dynamics 365 (online) with Exchange Online or Exchange Server, in addition to Outlook email, you can synchronize Outlook appointments, contacts, and tasks.

You can also use server-side synchronization to synchronize Dynamics 365 (online) with a POP3 email server for web-hosted email like Gmail or Outlook.com. If you synchronize email with a POP3 email server, you can't synchronize appointments, contacts, and tasks, however.

> **NOTE**
> Using encryption software (such as Vaultive) together with server-side synchronization is not supported.
>
> If you use server-side sync in Dynamics 365, you won't be able to view S/MIME encrypted messages. Encrypting emails with S/MIME requires an application to use an S/MIME control which server-side sync does not support. For more information on S/MIME encryption, see Encrypt messages by using S/MIME in Outlook Web App.

### Synchronization scenarios

Choose one of the following scenarios to configure server-side synchronization for your organization:

- Connect Dynamics 365 (online) to Exchange Online
- Connect Dynamics 365 (online) to Exchange Server on-premises
- Connect to a POP3 or SMTP server

### See also

Server-side synchronization Troubleshooting server-side synchronization

# Connect Dynamics 365 (online) to Exchange Online

9/8/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

With both Dynamics 365 (online) and Microsoft Exchange Online hosted as online services, connecting the two is a simpler, more straightforward configuration.

> **TIP**
> Check out the following video: Connect Dynamics 365 (online) to Exchange Online using server-side sync.

> **IMPORTANT**
> This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to Dynamics 365 (online)?

## Get Exchange ready

To use Exchange Online with Dynamics 365 (online), you must have an Exchange Online subscription that comes as part of an Office 365 subscription or that can be subscribed to separately. For information on Exchange Online, see:

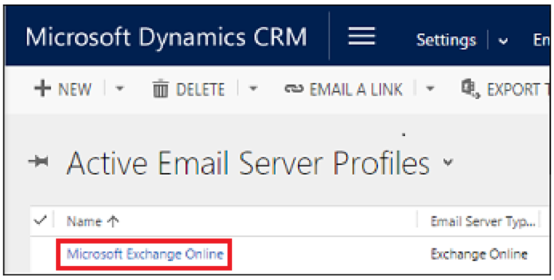
- Exchange Online
- Exchange Online Service Description
- Office 365 service comparison

> **TIP**
> To make sure you've got a good connection to Exchange Online, run the Microsoft Remote Connectivity Analyzer. For information on what tests to run, see Test mail flow with the Remote Connectivity Analyzer.

## Verify you have the profile: Microsoft Exchange Online

If you have an Exchange Online subscription in the same tenant as your Dynamics 365 (online) subscription, Dynamics 365 (online) creates a default profile for the email connection: **Microsoft Exchange Online**. To verify this profile:

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.
2. Click **Active Email Server Profiles** and check that the **Microsoft Exchange Online** profile is in the list.




If the Microsoft Exchange Online profile is missing, verify you have an Exchange Online subscription and that it exists in the same tenant as your Dynamics 365 (online) subscription.

3. If there are multiple profiles, click the **Microsoft Exchange Online** profile and set it as default.

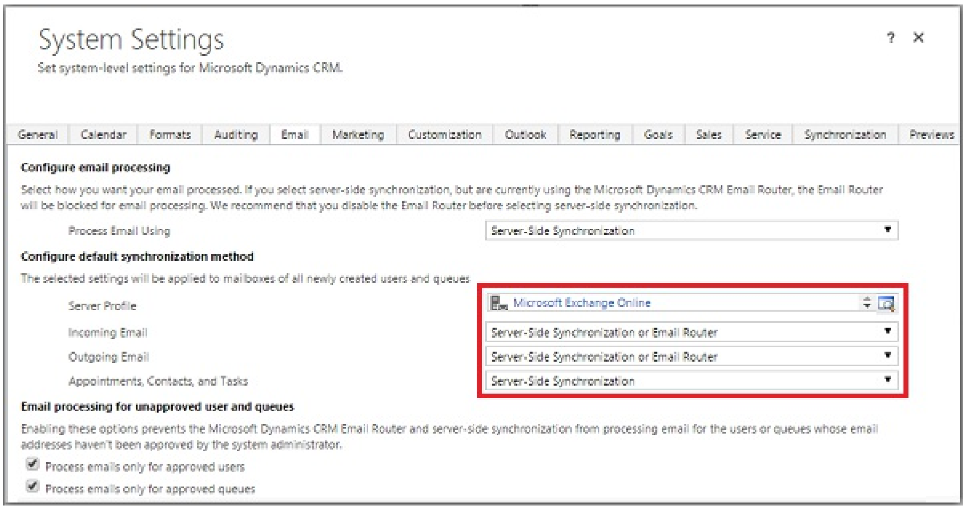
# Configure default email processing and synchronization

Set server-side synchronization to be the default configuration method for newly created users.

1. Go to **Settings** > **Email Configuration** > **Email Configuration Settings**.

2. Set the processing and synchronization fields as follows:

   - **Server Profile**: Microsoft Exchange Online
   - **Incoming Email**: Server-Side Synchronization or Email Router
   - **Outgoing Email**: Server-Side Synchronization or Email Router
   - **Appointments, Contacts, and Tasks**: Server-Side Synchronization or Email Router




3. Click **OK**.

All new users will have these settings applied to their mailbox.

# Configure mailboxes

New users will have their mailboxes configured automatically with the settings you made in the prior section. For existing users added prior to the above settings, you must set the Server Profile and the delivery method for email, appointments, contacts, and tasks.

In addition to administrator permissions, you must have Read and Write privileges on the Mailbox entity to set the delivery method for the mailbox.

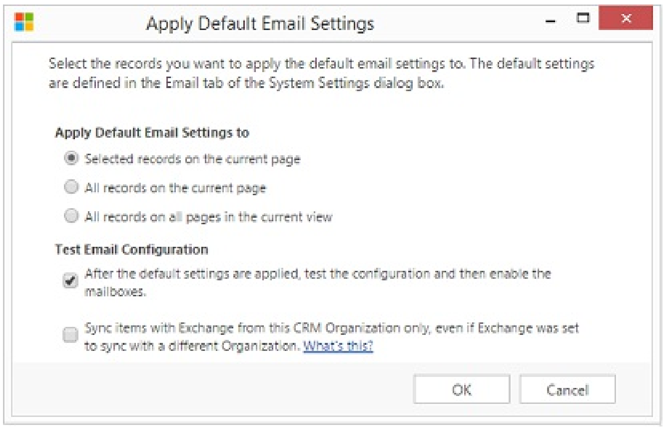
Choose **one** of the following methods:

**Set mailboxes to the default profile**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Choose **Active Mailboxes**.

3. Select all the mailboxes that you want to associate with the Microsoft Exchange Online profile, click **Apply Default Email Settings**, verify the settings, and then click **OK**.




By default, the mailbox configuration is tested and the mailboxes are enabled when you click **OK**.

**Edit mailboxes to set the profile and delivery methods**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes that you want to configure, and then click **Edit**.

4. In the **Change Multiple Records** form, under **Synchronization Method**, set **Server Profile** to **Microsoft Exchange Online**.

5. Set **Incoming** and **Outgoing Email** to **Server-Side Synchronization or Email Router**.

6. Set **Appointments, Contacts, and Tasks** to **Server-Side Synchronization**.

7. Click **Change**.

## Approve email

You need to approve the email address of each user mailbox or queue before the mailbox can process email.

> **NOTE**
>
> You must be an Office 365 Global administrator to approve emails.

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes that you want to approve, and then click **More Commands** (**…**) > **Approve Email**.

4. Click **OK**.

## Test configuration of mailboxes

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes you want to test, and then click **Test & Enable Mailboxes**.

   This tests the incoming and outgoing email configuration of the selected mailboxes and enables them for email processing. If an error occurs in a mailbox, an alert is shown on the Alerts wall of the mailbox and the profile owner. Depending on the nature of the error, Dynamics 365 tries to process the email again after some time or disables the mailbox for email processing.

   To see alerts for an individual mailbox, open the mailbox and then under **Common**, click **Alerts**.

   The result of the email configuration test is displayed in the **Incoming Email Status**, **Outgoing Email Status**, and **Appointments, Contacts, and Tasks Status** fields of a mailbox record. An alert is also generated when the configuration is successfully completed for a mailbox. This alert is shown to the mailbox owner.

   You can find information on recurring issues and other troubleshooting information in Blog: Test and Enable Mailboxes in Microsoft Dynamics CRM 2015 and Troubleshooting and monitoring server-side synchronization.

   Make sure you've got a good connection to Exchange Online by running the Microsoft Remote Connectivity Analyzer. For information on what tests to run, see Test mail flow with the Remote Connectivity Analyzer.

> **TIP**
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

## Test email configuration for all mailboxes associated with an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Select the Microsoft Exchange Online profile, and then click **Test & Enable Mailboxes**.

   When you test the email configuration, an asynchronous job runs in the background. It may take a few minutes for the test to be completed. Dynamics 365 tests the email configuration of all the mailboxes associated with the Microsoft Exchange Online profile. For the mailboxes configured with server-side synchronization for synchronizing appointments, tasks, and contacts, it also checks to make sure they're configured properly.

> **TIP**
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

**See also**

Troubleshooting and monitoring server-side synchronization
Test mail flow with the Remote Connectivity Analyzer

# Connect Dynamics 365 (online) to Exchange Server (on-premises)

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

With Dynamics 365 (online), version 9.0, you can connect your Dynamics 365 (online) with Microsoft Exchange Server (on-premises).

Check out the following white paper: Setup Guide: Server-side synchronization for CRM Online and Exchange Server

## Prerequisites

1. **Exchange Server**. The following versions are supported: Exchange Server 2010 SP3, Exchange Server 2013 SP1, or Exchange Server 2016.
2. **Authentication**. During installation, Exchange configures Internet Information Services (IIS). To connect Dynamics 365 (online) with Exchange Server, Windows or Basic authentication must be enabled in Exchange Server.

   For more information on authentication, see:

   - Exchange Server 2010: Configure Integrated Windows Authentication
   - Exchange Server 2010: Configure Basic Authentication
   - Exchange Server 2010: Default Authentication Settings for Exchange-related Virtual Directories
   - Exchange Server 2013: Authentication and EWS in Exchange
   - Exchange Server 2013: Default settings for Exchange virtual directories
   - Exchange Server 2016: Default settings for Exchange virtual directories
3. **ApplicationImpersonation role**. You need to create and configure a service account with the **ApplicationImpersonation** role in Microsoft Exchange. More information: Impersonation and EWS in Exchange.
4. **Secured connection**. The connection between Dynamics 365 (online) and Exchange must be encrypted via TLS/SSL (HTTPS).
5. **Exchange Web Services (EWS)**. Connections to EWS must be allowed through the firewall. Often a reverse proxy is used for the exterior facing connection.

> **TIP**
>
> To make sure you've got a good connection to Exchange on-premises run the Microsoft Remote Connectivity Analyzer. For information on what tests to run, see Test mail flow with the Remote Connectivity Analyzer.

## Create an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Click **New** > **Exchange Server**.

3. **For an Exchange email server profile, specify the following details:**

| FIELDS | DESCRIPTION |
|---|---|
| **General** | |
| Name | Specify a meaningful name for the profile. |
| Description | Type a short description about the objective of the email server profile. |
| Auto Discover Server Location | Click **Yes** (recommended), if you want to use the automatically discover service to determine the server location. If you set this to **No**, you must specify the email server location manually. |
| Incoming Server Location and Outgoing Server Location | If you select **No** in **Auto Discover Server Location**, enter a URL for **Incoming Server Location** and **Outgoing Server Location**. |
| **Credentials** | |
| Authenticate Using Impersonation | Enter the credentials for the Exchange service account granted the **ApplicationImpersonation** role. |
| User Name | Type the user name for the Exchange service account. |
| Password | Type the password for the Exchange service account. |
| **Advanced** | |
| **Additional Settings** | |
| Process Email From | Select a date and time. Email received after the date and time will be processed by server-side synchronization for all mailboxes associated with this profile. If you set a value less than the current date, the change will be applied to all newly associated mailboxes and their earlier processed emails will be pulled. |
| Minimum Polling Intervals in Minutes | Type the minimum polling interval, in minutes, for mailboxes that are associated with this email server profile. The polling interval determines how often server-side synchronization polls your mailboxes for new email messages. |

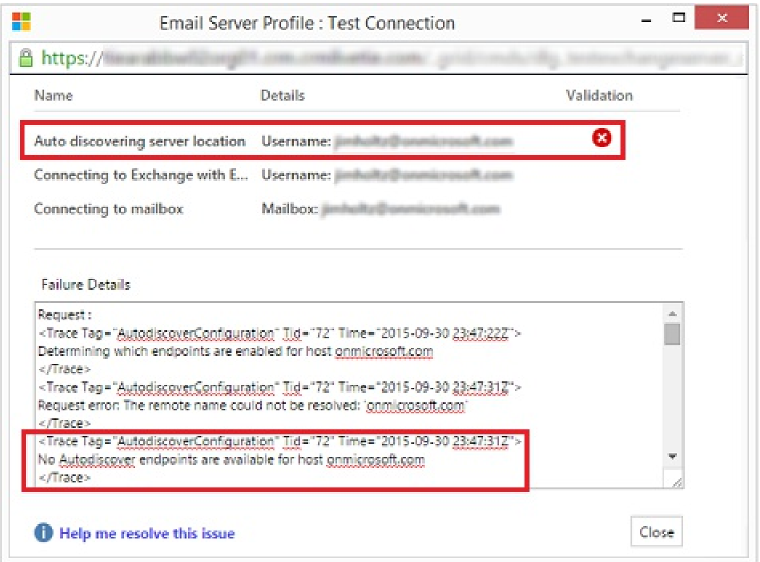
| FIELDS | DESCRIPTION |
| --- | --- |
| Maximum Concurrent Connections | Type the maximum number of simultaneous connections that can be made by Dynamics 365 to the corresponding email server per mailbox. Increase the value to allow more parallel calls to Exchange to improve performance or reduce the value if there are errors on Exchange due to large number of calls from Dynamics 365. The default value of this field is 10. The maximum number is considered per mailbox or per email server profile depending on whether the credentials are specified in a mailbox or email server profile. |
| Move Failed Emails to Undeliverable Folder | To move the undelivered email to the Undeliverable folder, click **Yes**. If there's an error in tracking email messages in Dynamics 365 as email activities, and if this option is set to **Yes**, the email message will be moved to the Undeliverable folder. |
| **Email Notifications** | |
| Send an alert email to the owner of the email server profile reporting on major events | If you want the email server profile owner to be notified when more than 50% of the mailboxes fail, click **Yes**. |

4. Click **Save**.

5. Click **Test Connection** and review the results. To diagnose issues, see the following section.

**Troubleshooting the Exchange Server (Hybrid) profile connection**

If you've run **Test Connection** and have issues with the Exchange Server (Hybrid) profile connection, use the information in the **Test Connection** dialog box to diagnose and fix the connection.




In this case, there's a problem with Auto Discover. The admin should review the user name and password used for **Authentication Using Impersonation** for the Exchange Server (Hybrid) profile.

You can find information on recurring issues and other troubleshooting information in Blog: Test and Enable Mailboxes in Microsoft Dynamics CRM 2015 and Troubleshooting and monitoring server-side synchronization.

# Configure default email processing and synchronization

Set server-side synchronization to be the default configuration method.

1. Go to **Settings** > **Email Configuration** > **Email Configuration Settings**.

2. Set the processing and synchronization fields as follows:

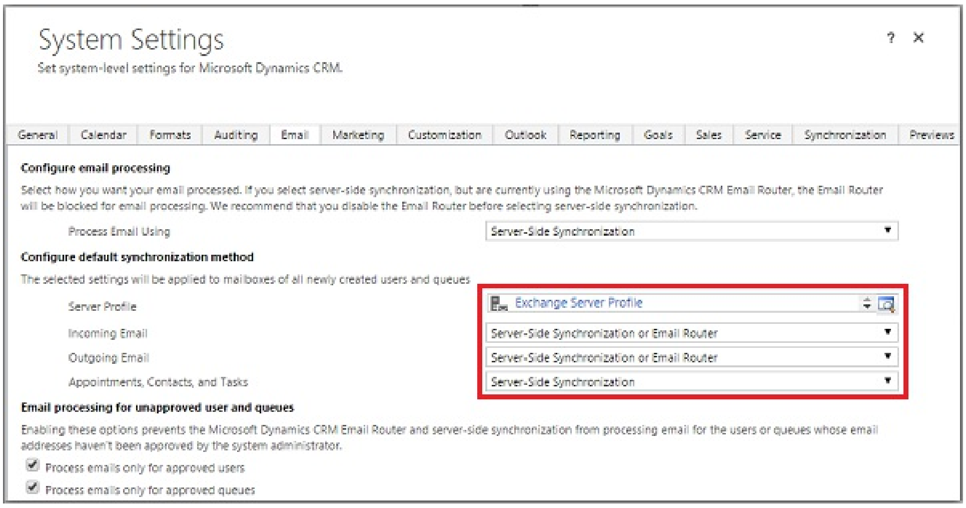
   - **Server Profile**: The profile you created in the above section.

   - **Incoming Email**: Server-Side Synchronization or Email Router

   - **Outgoing Email**: Server-Side Synchronization or Email Router

   - **Appointments, Contacts, and Tasks**: Server-Side Synchronization or Email Router

   If you leave the **Email processing form unapproved user and queues** at the default values (checked), you will need to approve emails and queues for user mailboxes as directed below in **Approve Email**.




3. Click **OK**.

# Configure mailboxes

To set mailboxes to use the default profile, you must first set the Server Profile and the delivery method for email, appointments, contacts, and tasks.

In addition to administrator permissions, you must have Read and Write privileges on the Mailbox entity to set the delivery method for the mailbox.

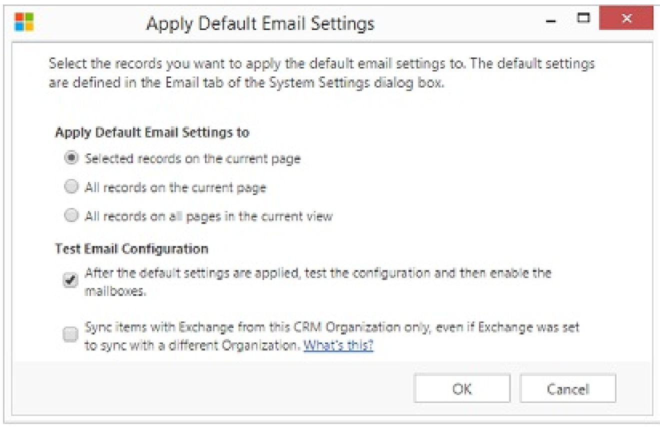
Select **one** of the following methods:

**Set mailboxes to the default profile**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select all the mailboxes that you want to associate with the Exchange Server profile you created, click **Apply Default Email Settings**, verify the settings, and then click **OK**.




By default, the mailbox configuration is tested and the mailboxes are enabled when you click **OK**.

**Edit mailboxes to set the profile and delivery methods**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes that you want to configure, and then click **Edit**.
4. In the **Change Multiple Records** form, under **Synchronization Method**, set **Server Profile** to the Exchange Server profile you created earlier.
5. Set **Incoming** and **Outgoing Email** to **Server-Side Synchronization or Email Router**.
6. Set **Appointments, Contacts, and Tasks** to **Server-Side Synchronization**.
7. Click **Change**.

## Approve email

You need to approve each user mailbox or queue before that mailbox can process email.

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes that you want to approve, and then click **More Commands** (**…**) > **Approve Email**.
4. Click **OK**.

## Test configuration of mailboxes

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes you want to test, and then click **Test & Enable Mailboxes**.

   This tests the incoming and outgoing email configuration of the selected mailboxes and enables them for email processing. If an error occurs in a mailbox, an alert is shown on the Alerts wall of the mailbox and the profile owner. Depending on the nature of the error, Dynamics 365 tries to process the email again after some time or disables the mailbox for email processing.

   The result of the email configuration test is displayed in the **Incoming Email Status**, **Outgoing Email Status**, and **Appointments, Contacts, and Tasks Status** fields of a mailbox record. An alert is also generated when the configuration is successfully completed for a mailbox. This alert is shown to the mailbox owner.

**TIP**

If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

## Test email configuration for all mailboxes associated with an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Select the profile you created, and then click **Test & Enable Mailboxes**.

   When you test the email configuration, an asynchronous job runs in the background. It may take a few minutes for the test to be completed. Dynamics 365 tests the email configuration of all the mailboxes associated with the Exchange Server profile. For the mailboxes configured with server-side synchronization for synchronizing appointments, tasks, and contacts, it also checks to make sure they're configured properly.

**TIP**

If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

**See also**

Troubleshooting and monitoring server-side synchronization
Test mail flow with the Remote Connectivity Analyzer
Server-side synchronization
Autodiscover service
Managing the Autodiscover Service

# Connect Dynamics 365 to POP3 or SMTP servers

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Follow these steps to connect Microsoft Dynamics 365 with POP3/IMAP and SMTP email servers such as used for Gmail and Yahoo! Mail.

> **NOTE**
> For POP3/SMTP systems supported by Microsoft, check out the following topic : Supported email service configurations for server-side synchronization.

## Create an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Choose **New** > **POP3-SMTP Profile**.

3. **For an Exchange email server profile, specify the following details:**

| FIELDS | DESCRIPTION |
|---|---|
| **General** | |
| Name | Specify a meaningful name for the profile. |
| Description | Type a short description about the objective of the email server profile. |
| Incoming Server Location and Outgoing Server Location | Enter the **Incoming Server Location** and **Outgoing Server Location**<br><br>For example, Incoming: pop3.live.com and Outgoing: smtp.live.com |
| **Credentials** | |

| FIELDS | DESCRIPTION |
|---|---|
| Authenticate Using | Select a method to authenticate while connecting to the specified email server.<br><br>- **Credentials Specified by a User or Queue**. If you select this option, the credentials specified in the mailbox record of a user or queue are used for sending or receiving email for the respective user or queue. **Note:** To ensure the credentials are secured in Dynamics 365, SQL encryption is used to encrypt the credentials stored in the mailbox.<br>- **Credentials Specified in Email Server Profile**. If you select this option, the credentials specified in the email server profile are used for sending or receiving email for the mailboxes of all users and queues associated with this profile. The credentials must have impersonation or delegation permissions on the mailboxes associated with profile. This option requires some configuration on the email server, for example, configuring impersonation rights on Exchange for the mailboxes associated with the profile. **Note:** To ensure the credentials are secured in Dynamics 365, SQL encryption is used to encrypt the credentials stored in the email server profile if you're processing email by using server-side synchronization.<br>- **Windows Integrated Authentication**. This option applies only to Exchange and SMTP email server types. If you select this option, the credentials with which the Dynamics 365 Asynchronous Service has been configured will be used.<br>- **Without Credentials (Anonymous)**. Not a valid setting. |
| User Name | Type the user name used to connect to the email server for sending or receiving email for the mailboxes of all users and queues associated with this profile. This field is enabled and valid only if **Authenticate Using** is set to **Credentials Specified in Email Server Profile**. The user name that you specify must have permission to send and receive email from the mailboxes of users and queues associated with this profile. **Note:** If you're using HTTP for Dynamics 365, the **User Name** and **Password** fields will be disabled. To enable the option, change the value of the deployment property AllowCredentialsEntryViaNonSecureChannels to 1. |
| Password | Specify the password of the user that will be used together with the user name to connect to the email server for sending or receiving email for the mailboxes of users and queues associated with this profile. The password is stored securely. **Note:** If you're using HTTP for Dynamics 365, the **User Name** and **Password** fields will be disabled. To enable the option, change the value of the deployment property AllowCredentialsEntryViaNonSecureChannels to 1. |
| Use same settings for Outgoing | If you want to use the same credential settings for the incoming and outgoing connections, choose **Yes**. |
| **Advanced** | |

| FIELDS | DESCRIPTION |
|---|---|
| Incoming Port | This field shows the port on the email server for accessing the incoming email. This field is automatically populated when you save the record. |
| Outgoing Port | This field shows the port on the email server for accessing the outgoing email. This field is automatically populated when you save the record. |
| Use SSL for Incoming Connection | Choose **Yes** if the email channel is on a secure channel and TLS/SSL must be used for receiving email. |
| Use SSL for Outgoing Connection | Choose **Yes** if the email channel is on a secure channel and TLS/SSL must be used for sending email. |
| Incoming Authentication Protocol and Outgoing Authentication Protocol | Select a protocol that will be used for authentication for incoming and outgoing email. |
| **Additional Settings** | |
| Process Email From | Select a date and time. Email received after the date and time will be processed by server-side synchronization for all mailboxes associated with this profile. If you set a value less than the current date, the change will be applied to all newly associated mailboxes and their earlier processed emails will be pulled. |
| Minimum Polling Intervals in Minutes | Type the minimum polling interval, in minutes, for mailboxes that are associated with this email server profile. The polling interval determines how often server-side synchronization polls your mailboxes for new email messages. |
| Maximum Concurrent Connections | Type the maximum number of simultaneous connections that can be made by Dynamics 365 to the corresponding email server per mailbox. Increase the value to allow more parallel calls to Exchange to improve performance or reduce the value if there are errors on Exchange due to large number of calls from Dynamics 365. The default value of this field is 10. The maximum number is considered per mailbox or per email server profile depending on whether the credentials are specified in a mailbox or email server profile. |

4. Choose **Save**.

## Configure default email processing and synchronization

Set server-side synchronization to be the default configuration method.

1. Go to **Settings** > **Email Configuration** > **Email Configuration Settings**.

2. Set the processing and synchronization fields as follows:

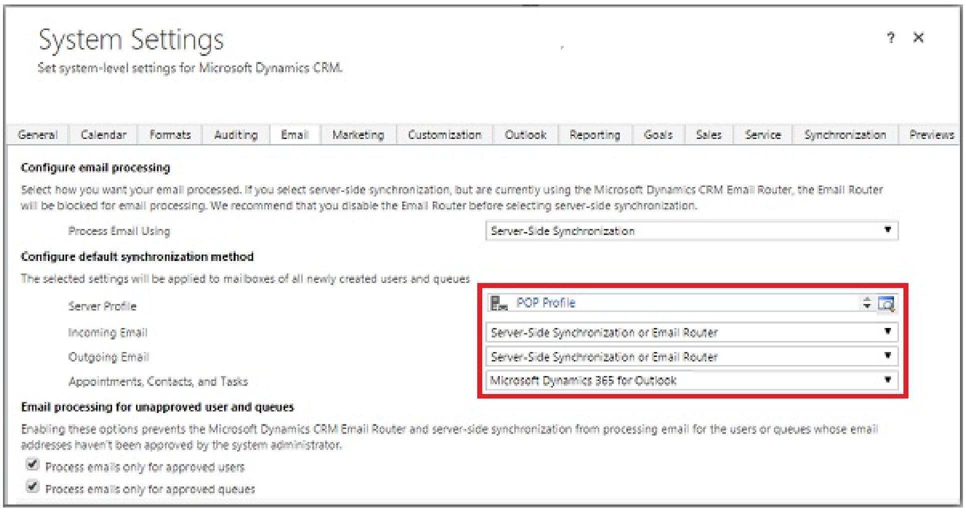
   - **Server Profile**: The profile you created in the above section.

   - **Incoming Email**: Server-Side Synchronization or Email Router

- **Outgoing Email**: Server-Side Synchronization or Email Router
- **Appointments, Contacts, and Tasks**: Server-Side Synchronization or Email Router

> **NOTE**
>
> Server-Side Synchronization or Email Router for Appointments, Contacts, and Tasks is not supported for the POP3-SMTP profile.

If you leave the **Email processing form unapproved user and queues** at the default values (checked), you will need to approve emails and queues for user mailboxes as directed below in **Approve Email**.




3. Click **OK**.

## Configure mailboxes

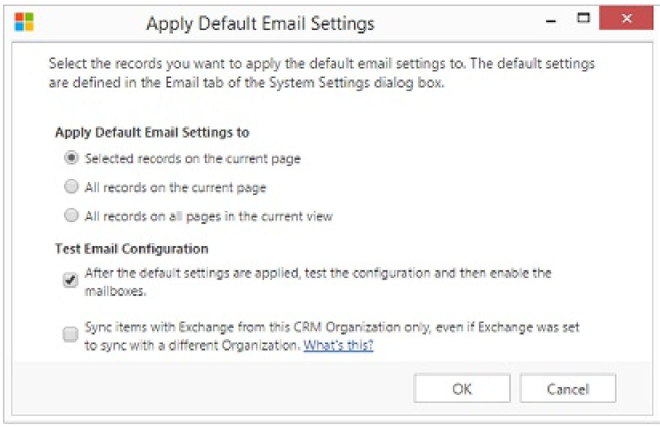
To set mailboxes to use the default profile, you must first set the Server Profile and the delivery method for email, appointments, contacts, and tasks.

In addition to administrator permissions, you must have Read and Write privileges on the Mailbox entity to set the delivery method for the mailbox.

Click **one** of the following methods:

**Set mailboxes to the default profile**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Choose **Active Mailboxes**.
3. Select all the mailboxes that you want to associate with the POP3-SMTP profile you created, click **Apply Default Email Settings**, verify the settings, and then click **OK**.




By default, the mailbox configuration is tested and the mailboxes are enabled when you click **OK**.

#### Edit mailboxes to set the profile and delivery methods

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes that you want to configure, and then click **Edit**.
4. In the **Change Multiple Records** form, under **Synchronization Method**, set **Server Profile** to the POP3-SMTP profile you created earlier.
5. Set **Incoming** and **Outgoing Email** to **Server-Side Synchronization or Email Router**.
6. Set **Appointments, Contacts, and Tasks** to **None**.
7. Click **Change**.

## Approve email

You need to approve each user mailbox or queue before that mailbox can process email.

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes that you want to approve, and then click **More Commands** (**…**) > **Approve Email**.
4. Click **OK**.

## Test configuration of mailboxes

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Click **Active Mailboxes**.
3. Select the mailboxes you want to test, and then click **Test & Enable Mailboxes**.

   This tests the incoming and outgoing email configuration of the selected mailboxes and enables them for email processing. If an error occurs in a mailbox, an alert is shown on the Alerts wall of the mailbox and the profile owner. Depending on the nature of the error, Dynamics 365 tries to process the email again after some time or disables the mailbox for email processing.

   The result of the email configuration test is displayed in the **Incoming Email Status**, **Outgoing Email Status**, and **Appointments, Contacts, and Tasks Status** fields of a mailbox record. An alert is also generated when the configuration is successfully completed for a mailbox. This alert is shown to the mailbox owner.

You can find information on recurring issues and other troubleshooting information in Blog: Test and Enable Mailboxes in Microsoft Dynamics CRM 2015 and Troubleshooting and monitoring server-side synchronization.

> **TIP**
>
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

## Test email configuration for all mailboxes associated with an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Select the profile you created, and then click **Test & Enable Mailboxes**.

   When you test the email configuration, an asynchronous job runs in the background. It may take a few minutes for the test to be completed. Dynamics 365 tests the email configuration of all the mailboxes associated with the POP3-SMTP profile. For the mailboxes configured with server-side synchronization for synchronizing appointments, tasks, and contacts, it also checks to make sure they're configured properly.


> **TIP**
>
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.


## Network ports for Dynamics 365 (online) Government

The following ports are open for outbound connections between Dynamics 365 (online) Government and internet services.

- 80 HTTP
- 443 HTTPS
- 465 Secure SMTP
- 995 Secure POP3

Customizations or email configurations in Dynamics 365 (online) Government can only use these ports.

### See also

Troubleshooting and monitoring server-side synchronization
Test mail flow with the Remote Connectivity Analyzer
Set up server-side synchronization
Microsoft Dynamics 365 (online) Government

# Migrate settings from the Email Router to server-side synchronization

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

> **NOTE**
> The Microsoft Dynamics CRM Email Router has been deprecated and was removed in version 9.0 of Dynamics 365. To prepare for this change, we strongly recommend that you migrate all email routing functionality to use the server-side synchronization feature.

Server-side synchronization is a method in Dynamics 365 that you can use to set up email and synchronize your appointments, contacts, and tasks. With server-side synchronization, you can centrally manage mailboxes and profiles, and also track errors about email processing. If your organization is currently using the Email Router, but wants to start using server-side synchronization instead, you can easily migrate the configuration settings from the Email Router to server-side synchronization to set up email.

> **NOTE**
> An organization can only use either the Email Router or server-side synchronization to process email. You can define what to use in the **Email** tab of System Settings in Dynamics 365. If you select server-side synchronization, the Email Router stops functioning for the organization.
>
> To switch from Outlook synchronization to server-side synchronization, simply change the synchronization method in mailbox records to server-side synchronization. That's all you have to do to make the change from Outlook synchronization to server-side synchronization.

During migration, the old incoming and outgoing profiles for the user and queue mailboxes are merged to create a new email server profile that will be used by server-side synchronization.

1. Go to **Settings** > **Email Configuration**.
2. Choose **Migrate Email Router Data**.
3. In the Email Router Data Migration wizard, in the three text boxes, choose **Browse**, and select the three files specified at the top of the page in the same order. If you must migrate data from multiple email routers, choose **More Email Routers** and again select the three files. You can migrate data from up to four email routers at once.

   > **NOTE**
   > The maximum combined size of all the files from all the email routers that you can upload at a time is 32 MB.

4. Choose **Next**.
5. On the **Select Email Server Profiles to Migrate** page, the incoming and outgoing email server profiles of the Email Router are listed and the details about the new email server profile for server-side synchronization is also listed. If you want to migrate the profile, in **Migrate Server Profile**, choose **Yes**.

In the Email Router, incoming and outgoing email server profiles are different and each user or queue is associated with both incoming and outgoing profiles. However, with server-side synchronization, the incoming and outgoing settings are defined in a single profile and a user or queue is associated with this profile. Thus, when you migrate the data, the data from two server profiles is combined into one. The **Select Email Server Profiles to Migrate** page shows details about the new email server profile that will be created.

6. Choose **Next**.

7. The **Migration Review Summary** page shows what data will be migrated. Choose **Start**.

   After the migration is complete, you'll see the summary of the migrated data. You must test the email configuration for the mailboxes after the migration is complete. To be able to start email processing through server-side synchronization, in the **Process Email From** field in the **System Settings** dialog box, select **Server-Side Synchronization**.

## Best practices

Here are some recommendations for migrating from Email Router to server-side synchronization.

1. Check to make sure the synchronization filters do not pick up data which is older than two weeks. These are the default settings, so unless you've changed something, you won't need to reconfigure them. See Server-side synchronization.

2. In the email server profile (**Settings** > **Email Configuration** > **Email Server Profiles**), verify that the migration tool sets the **Process Email From** field to 24 hours.

3. Test and enable no more than 200 mailboxes at a time and every 5 hours, in order to allow the mapping table to rebuild.

4. Start with the queues mailboxes, and then migrate the users' mailboxes.

**See also**

Monitor email processing errors in Microsoft Dynamics 365

# Troubleshooting and monitoring server-side synchronization

8/24/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

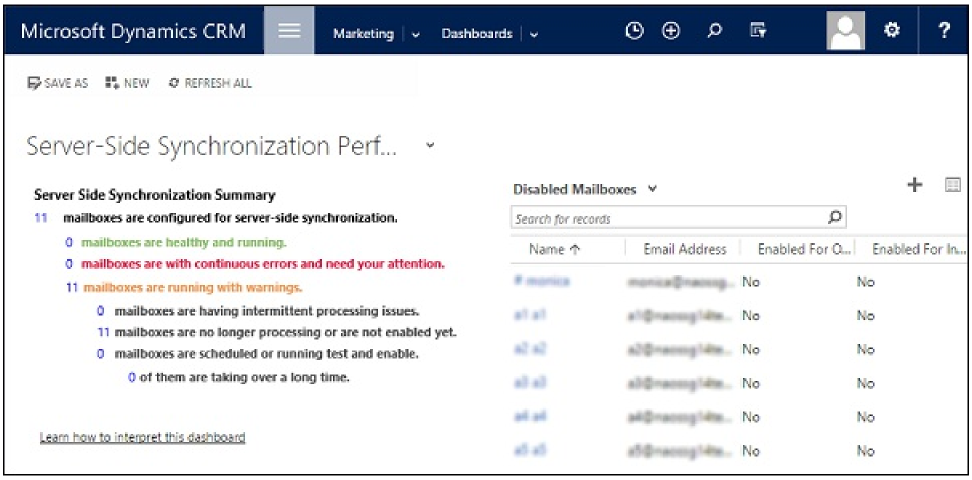
This page is your source for issues and resolutions for troubleshooting server-side synchronization. Check back for updated information as issues are discovered and resolutions recorded.

> **TIP**
> Check out the following: Blog: Test and Enable Mailboxes in Dynamics CRM 2015

## The Server-Side Synchronization Performance dashboard

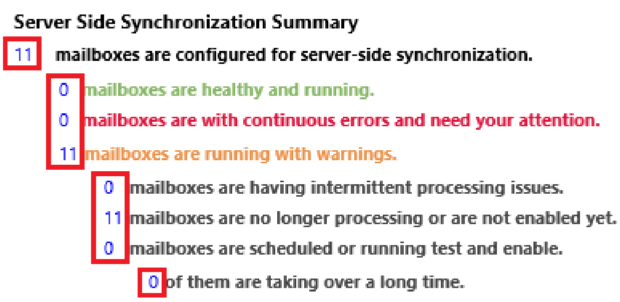
You can use the Server-Side Synchronization Performance dashboard to get a quick look at the health of mailboxes using server-side sync.

Go to any dashboard, click Select next to the dashboard title, and then click **Server-Side Synchronization Performance**.

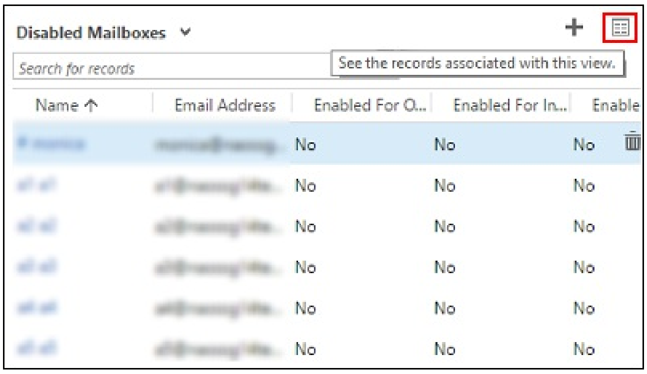



This dashboard is made up of multiple charts, each providing insights into your organization's server-side sync performance.

Click on a number in the list of mailboxes configured for server-side sync to get a specific mailbox status.




Click on the grid icon in each chart to view the records that are used to generate the chart.




## Common alerts and recommended resolutions

**Mailbox disabled for synchronization**

**Alert:** The mailbox has been disabled for synchronizing appointments, contacts, and tasks for the mailbox because an error occurred while establishing a secure connection to the Exchange server. The owner of the email server profile has been notified.

**Solution:** http://support.microsoft.com/kb/2993502

**Error while establishing a secure connection**

**Alert:** Email cannot be received for the mailbox because an error occurred while establishing a secure connection to the email server. The mailbox has been disabled for receiving email and the owner of the email server profile has been notified.

**Solution:** http://support.microsoft.com/kb/2993502

**Email message has "Pending Send" status**

If you create an email message in Dynamics 365 and click the **Send** button, the message will not be sent unless email integration has been correctly configured and enabled for sending email from Dynamics 365.

Verify that the user who sent the email is enabled for sending email.

1. Click **Settings**, and then click **Email Configuration**.
2. Click **Mailboxes**, and then change the view to **Active Mailboxes.**
3. Select the Dynamics 365 mailbox record for the user who sent the email, and then click the **Edit** button.
4. Verify the user is correctly configured and enabled for sending email:
   - If the user's Dynamics 365 mailbox record is configured to use server-side synchronization for outgoing email, verify the user's email address is approved and is also tested and enabled. For more information about configuring server-side synchronization, see Set up server-side synchronization of email, appointments, contacts, and tasks.

**Email address requires approval by Office 365 administrator**

**Alert:** Email cannot be sent/received because the email address of the mailbox <User Name> requires an approval by an Office 365 administrator. The mailbox has been disabled for sending/receiving email and the owner of the email server profile Exchange Online has been notified.

**Cause:**

This error will occur if a user is configured to use the Microsoft Exchange Online email server profile but their email address has not been approved by an Office 365 administrator. A user with the global administrator role in Office 365 needs to approve the email address for each user that uses the Microsoft Exchange Online email server profile. The Microsoft Exchange Online profile uses server-to-server authentication between Dynamics 365 (online) and Exchange Online. This authentication is dependent on a trust between Dynamics 365 (online) and Exchange Online. By verifying the email address in Dynamics 365 as an Office 365 global administrator, Dynamics 365 (online) will be able to send and receive email for that user without the need to provide any email credentials within Dynamics 365.

**Solution:**

To approve one or more mailboxes:

1. Sign in to Dynamics 365 (online) as a user with the global administrator role in Office 365.
2. Go to **Settings** > **Email Configuration**.
3. Click **Mailboxes**.
4. Select **Active Mailboxes** or perform an **Advanced Find** query to identify a list of mailboxes to update.
5. Select the list of mailboxes you want to approve and then click **Approve Email**.
6. Click **OK** to approve the email addresses.
7. Click **Test & Enable Mailboxes** to retest email processing for the enabled mailboxes.

#### Email addresses must be approved

**Alert:** One or more mailboxes have been disabled for sending/receiving email because their email addresses have not been approved. Approve the email addresses, and then enable the mailboxes for sending/receiving email." or "Email cannot be received for the mailbox <Mailbox Name> because the email address of the mailbox <Mailbox Name> is not approved and the mailbox has been disabled. The owner of the associated email server profile <Email Server Profile name> has been notified.

**Solution:**

Mailboxes must be approved before the email will be processed. To approve mailboxes:

1. Sign in to Dynamics 365 (online) as a user with the global administrator role in Office 365.
2. Go to **Settings** > **Email Configuration**.
3. Click **Mailboxes**.
4. Select **Active Mailboxes** or perform an **Advanced Find** query to identify a list of mailboxes to update.
5. Select the list of mailboxes you want to approve and then click **Approve Email**.
6. Click **OK** to approve the email addresses.
7. Click **Test & Enable Mailboxes** to retest email processing for the enabled mailboxes.

> **NOTE**
>
> You can remove the requirement for approving mailboxes using: **Settings** > **Administration** > **System Settings** > **Email** tab. Uncheck **Process emails only for approved users** and **Process emails only for approved queues**, then click **OK**. If you are using the Microsoft Exchange Online profile, email addresses must still be approved by an Office 365 global administrator.

#### Mailbox location could not be determined

**Alert:** The mailbox location could not be determined while sending/receiving the email message <Message Subject>. The mailbox <Mailbox Name> has been disabled for sending/receiving email and the owner of the associated email server profile <Email Server Profile name> has been notified.

**Solution:** You will see this alert if your email server profile (**Settings** > **Email Configuration** > **Email Server**

**Profiles**) is configured to use the **Auto Discover Server Location** option but auto discover cannot detect the location of your mailbox. If this issue occurs, check with your Exchange administrator to verify your network is configured for auto discover. You can update the email server profile and click **No** for **Auto Discover Server Location**. Then provide the Exchange web services URL for your Exchange deployment. For example: https://ExchangeServerName/EWS/Exchange.asmx.

#### Credentials are incorrect or have insufficient permissions

**Alert:** Email cannot be sent/received because the credentials specified in the associated email server profile are incorrect or have insufficient permissions for sending/receiving email. The mailbox <Mailbox Name> has been disabled for sending/receiving email and the owner of the email server profile <Email Server Profile name> has been notified.

**Solution:**

This error can appear if incorrect credentials are provided or if the user account specified to access the mailbox does not have sufficient permissions to the mailbox. Check credentials and permissions for the mailbox. If you are providing credentials within an email server profile, make sure the user has impersonation permissions and mailbox access to each associated mailbox.

For more information on configuring Exchange impersonation and granting mailbox access, see:

- Configuring Exchange Impersonation
- Allow Mailbox Access

#### Appointments can’t be synchronized

**Alert:** Appointments can’t be synchronized because the Organizer field is not present.

**Cause:** The Organizer field is required for appointment records to synchronize. By default, this field isn’t included on the appointment form.

**Solution:**

To add the Organizer field to the appointment form:

1. Go to **Settings** > **Customizations** > **Customize the System**
2. Under **Components**, expand **Entities** > **Appointment**, and then click **Forms**.
3. Click **Appointment**, and then drag the **Organizer** field onto the form.
4. Click **Save** > **Publish**.

#### Appointments, contacts, and tasks can't be synchronized

**Alert:** Appointments, contacts, and tasks can't be synchronized because the email address of the mailbox <Mailbox Name> is configured with another Dynamics 365 organization. The best practice is to overwrite the configuration when you test and enable the mailbox in your primary organization. Also, change the synchronization method for your mailbox in non-primary organizations to None.

**Solution:**

To change the primary synchronization organization and overwrite the setting stored in Exchange, click: **Settings** > **Email Configuration** > **Mailbox** > open a mailbox > **Test & Enable Mailbox** > select **Sync items with Exchange from this Dynamics 365 Organization only, even if Exchanges was set to sync with a different Organization**. This will allow server-side synchronization to work for this Dynamics 365 instance but the other instance would no longer work for synching that mailbox through server-side synchronization. To change the synchronization method for Appointments, Contacts, and Tasks, click: **Settings** > **Email Configuration** > **Mailbox** > open a mailbox > select **None** for **Appointments, Contacts, and Tasks**.

For more information, see: When would I want to use this check box?

## Potential issues and resolutions

**Email fails to be sent or received when server-side synchronization is configured with Gmail**

If Dynamics 365 is configured to use Server-Side Synchronization with Gmail, you may encounter one of the following errors:

- Email cannot be received for the mailbox <Mailbox Name>. Make sure that the credentials specified in the mailbox are correct and have sufficient permissions for receiving email. Then, enable the mailbox for email processing.
- An unknown error occurred while sending the email message "Test Message". Mailbox <Mailbox Name> didn't synchronize. The owner of the associated email server profile <Email Server Profile Name> has been notified.

For more information, see this kb article.

**Using Dynamics 365 (online) with Exchange Online**

If your company is using Exchange Online with Dynamics 365 (online), note the following:

Dynamics 365 (online) supports server-side synchronization with Exchange Online in the same tenant with Server to Server Authentication. Other authentication methods or settings are not recommended or supported, including:

- Using Credentials Specified by a User or Queue
- Using Credentials Specified in Email Server Profile
- Using Impersonation
- Setting Auto Discover Server Location to No
- Using an email server profile other than Exchange Online
- Connecting Dynamics 365 (online) with Exchange Online in different tenant is not supported.

**Mailbox deliveries regularly disabled**

Mailbox delivery errors are classified as follows:

1. A permanent error (for example, 401 Unauthorized) or a transient error (for example, a network issue).
2. A server error (for example, invalid profile credentials) or a mailbox error (for example, invalid mailbox credentials).

   Dynamics 365 responds to the error as follows:

- For server or mailbox permanent errors, the mailbox is disabled as soon as the error is detected.
- For server or mailbox transient errors, delivery is retried up to 10 times with a 5 minute gap between attempts. If delivery fails after 10 attempts, the error is considered permanent and the mailbox is disabled.

Review the troubleshooting steps in this topic and if the issue is successfully resolved, enable the mailbox.

**Unsupported email service configurations**

Server-side synchronization doesn’t support the following scenarios:

- Mix of Exchange/SMTP and POP3/Exchange.

- Creation of mass email marketing campaigns.
- Extensibility scenarios like extending EWS/POP3/SMTP protocols and creating custom email providers.
- Exchange Server 2003 and Exchange Server 2007.
- Server-side synchronization in Dynamics 365 (online), or in a Dynamics 365 (on premises) deployment that is configured for FIPS 140-2 compliancy, requires a POP3/SMTP email server that is also FIPS 140-2 compliant. Some email servers are not FIPS 140-2 compliant, such as MSN, Outlook.com, or Windows Live Mail.

For most situations not supported by server-side synchronization, you can use the Microsoft Dynamics CRM Email Router. More information: Integrate your email system with Dynamics 365

> **NOTE**
> We recommend that you don't use a mixed configuration of Outlook synchronization and server-side synchronization for appointments, contacts, and tasks in the same organization, because it may result in updated Dynamics 365 data not synchronizing to all attendees.

#### Appointment record is not created in Dynamics 365 when tracked by invitee

Consider the following scenario regarding tracking an event in Dynamics 365:

1. An event organizer uses Outlook for the synchronization method.
2. An event invitee uses server-side synchronization for the synchronization method.
3. In Dynamics 365 for Outlook, the organizer creates an appointment and sends an invite to the invitee.
4. In Dynamics 365 for Outlook, the invitee tracks the appointment.
5. The invitee logs in to Dynamics 365 and navigates to **Marketing** > **Activities** > **Appointment** > **My Appointments**

Result: the appointment is not created in Dynamics 365 for the invitee.

This is a known issue and is not supported. If the organizer is someone outside of the Dynamics 365 organization, a Dynamics 365 user who is an invitee can still track the appointment and have the record created in Dynamics 365.

#### Service Appointments and Activities don't synchronize from Outlook to Dynamics 365

Changes made to Service Appointments and Activities in Dynamics 365 will update in Dynamics 365 for Outlook when you synchronize but the reverse is not true. When you make changes to Service Appointments or Activities in Dynamics 365 for Outlook, the changes are not synchronized to Dynamics 365. Service appointments are scheduled by an agent and need free/busy information for resources available only in Dynamics 365.

#### Be aware of Exchange Online receiving and sending limits

For enterprise customers with a large mail flow, make sure you're not running up against Exchange Online receiving and sending limits. See Exchange Online Limits

#### See also

Server-side synchronization Best practices and things to know about server-side synchronization
{Hidden Gem}Understanding Server Side sync Performance Dashboard

# When would I want to use this check box?

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

A user can be a member of more than one Dynamics 365 organization, but an Exchange mailbox (email address) can only synchronize emails, appointments, contacts, and tasks with one organization, and a user that belongs to that organization can only synchronize emails, appointments, contacts, and tasks with one Exchange mailbox. Dynamics 365 stores the organization ID (`OrgID`) for the synchronizing organization and the last time the user synced in Exchange.

You can use the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box to overwrite the setting stored in Exchange if you want to change the primary synchronizing organization. Why would you want to do this? In most cases, you won't need to. Most users are members of just one organization. When an admin starts the synchronization for the user's Exchange mailbox by testing and enabling the mailbox through server-side synchronization, the user's mailbox is automatically set to synchronize appointments, contacts, and tasks with that organization.

However, you may want to select the check box in the following situations:

- The `OrgID` setting in Exchange can inadvertently be overwritten in certain circumstances. For example, let's say a user is a member of two organizations: one in North America and one in Japan. The admin for the North American organization sets up the user's mailbox through server-side synchronization. Then the admin for the organization in Japan sets up the same user's mailbox through server-side synchronization, overwriting the `OrgID` setting stored in Exchange. The user will only be able to synchronize appointments, contacts, and tasks with the organization in Japan. To reset the user's mailbox, select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box.

- In some cases, you may not know the state of the configuration stored in Exchange, but the user's Exchange mailbox is not able to synchronize for some reason. In this case, select the check box to start synchronizing the mailbox with the appropriate organization.

- If an admin has migrated users from one organization to another, a user's mailbox might still be set to synchronize with the old organization. In this case, select the check box to start synchronizing the mailbox with the appropriate organization.

  To make sure an administrator doesn't inadvertently set a non-primary organization as the synchronizing organization, it's a best practice to set the synchronization method for the non-primary organization to **None**.

## Set the synchronization method to "None" for the non-primary organization

1. Go to **Settings** > **Email Configuration**.

2. Choose **Mailbox**.

3. Choose the mailbox record to open it.

4. In the **Mailbox** dialog box, under **Synchronization Method**, select **None** in the **Appointments, Contacts, and Tasks** list.

**See also**

Set up server-side synchronization of email, appointments, contacts, and tasks

# Error logging for server-side synchronization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

In this topic, you will learn about the error logging tasks performed by server-side synchronization. server-side synchronization generates alerts if an error occurs while processing email. An error is classified based on the nature of the error and on the object the error was encountered for.

The following table shows classification of errors based on the nature of the errors.

| TRANSIENT ERRORS | PERMANENT ERRORS |
|---|---|
| - Errors are temporary in nature and may get fixed automatically after certain attempts. If the error persists after reaching the configured retry count, a new error (without changing the error code) is logged as a permanent error.<br>- These errors do not require a direct corrective action by a Dynamics 365 user, but an administrator should look for any reliability or throttling issues.<br>- All errors appear in the Warning section of the administrator's and user's alert wall. | - These are permanent in nature and mostly occur when the transient errors remain unresolved even after certain attempts. Permanent errors can also be triggered directly without any transient errors (for example: password expired).<br>- Email processing for the affected mailboxes is stopped as a result of these errors. These require a corrective action by the mailbox owner or a Dynamics 365 administrator.<br>- All permanent errors appear in Error section of the administrator's and user's alert wall. |

The errors are also classified based on the object on which the error is encountered:

- **Email-level errors.** Errors that are specific to an email and prevent processing of an individual email without impacting processing of other emails. Error alerts are displayed in the Alerts section of the email form.
- **Mailbox-level errors.** Errors that are specific to a mailbox and prevent processing of all emails in a mailbox and require corrective action from the respective mailbox owner. Error alerts are displayed in the alerts section of the email form, mailbox owner's alert wall, and on the Mailbox form.
- **Profile-level errors.** Errors which prevent processing of all emails in one or more mailboxes and require corrective action from the associated email server profile owner. Error alerts are displayed on the alerts section of the email server profile form, alerts wall of the owner of the email server profile, and on the alert walls of the impacted mailbox owners - but no action is required from them.

To know how to view the alerts and the actions you can take on these alerts, see Monitor email processing errors.

### See also

Troubleshooting and monitoring server-side synchronization
Supported scenarios for server-side synchronization

# Best practices for server-side synchronization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Consider the following when planning and deploying server-side synchronization.

## Best practices for configuring server-side synchronization

**If you use Dynamics 365 (online) and Exchange Online**

By default, the Microsoft Exchange Online email server profile is created for Dynamics 365 (online) organizations and should be your first choice. If you want to use your own profile, you use Dynamics 365 (online), and Exchange Online, and both services are on the same tenant, use the following settings in your email server profile (**Settings** > **Email Configuration** > **Email Server Profiles**).

| SETTINGS | RECOMMENDATION |
| --- | --- |
| Auto Discover Server Location | Yes |
| **Incoming Connection** | |
| Authenticate Using | Server to Server Authentication |
| Use Impersonation | No |
| Use same settings for Outgoing | Yes |

**If you want to use one set of credentials to process emails with Outlook or Exchange**

Using one account to process email to all mailboxes is easier to maintain but requires using an account that has access to all mailboxes in Outlook or Exchange. The account must have impersonation rights on Exchange. If that single account is compromised, all mailboxes using that account are compromised. Use the following settings in your email server profile (**Settings** > **Email Configuration** > **Email Server Profiles** to use a single account for email processing.

| SETTINGS | RECOMMENDATION |
| --- | --- |
| **Incoming Connection** | |
| Authenticate Using | Credentials Specified in Email Server Profile |
| User Name | The administrator's user name |
| Password | The administrator's password |
| Use Impersonation | Yes |
| Use same settings for Outgoing | Yes |

Delegation (Use Impersonation = No) is not supported for syncing Appointments, Contacts, and Tasks.

#### If you want to use individual credentials to process emails with Outlook or Exchange

An alternative to a single account to process emails is using individual accounts. This method requires more maintenance effort but does not focus security on a single account. If you want each user account to synchronize with Outlook or Exchange and you're not using the Microsoft Exchange Online email server profile, use the following settings (**Settings** > **Email Configuration** > **Email Server Profiles**).

| SETTINGS | RECOMMENDATION |
|---|---|
| **Incoming Connection** | |
| Authenticate Using | Credentials Specified by a User or Queue |
| Use Impersonation | No |
| Use same settings for Outgoing | Yes |

Set the following in each user mailbox.

| SETTINGS | RECOMMENDATION |
|---|---|
| **Credentials** | |
| Allow to Use Credentials for Email Processing | Yes |
| User Name | The user name for the mailbox |
| Password | The password for the mailbox |

### See also

Server-side synchronization Troubleshooting server-side synchronization

# Create forward mailboxes or edit mailboxes

10/6/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

By default, when users and queues are created in Dynamics 365, their respective mailbox records are also created. These mailbox records contain information that is specific to an individual mailbox on the email server, like email address, mailbox credentials, and email synchronization method. To process email messages using server-side synchronization for users and queues, their respective mailbox records should be associated to an email server profile record in Dynamics 365.

If your organization wants to configure server-side synchronization using a forward mailbox, you can create a new forward mailbox record. A forward mailbox is used as a collection box for email messages that are transferred from each user's mailbox on the email system by a server-side rule. The forward mailbox must be dedicated to server-side synchronization, and must not be used as a working mailbox by an individual user. This can be used to process email messages for users and queues whose mailboxes have **Incoming Email Synchronization Method** set to **Forward Mailbox**. You must associate the forward mailbox record to an email server profile record to process email using server-side synchronization. Forward mailbox vs. individual mailboxes.

> **TIP**
> You can use an Office 365 shared mailbox when you create a queue in Dynamics 365 and not consume an Office 365 license for a forwarding email account.
>
> See Blog: CRM Queue with an Office 365 Shared Mailbox

1. Go to **Settings** > **Email Configuration**.
2. Click or tap **Mailboxes**.
3. Click or tap **New Forward Mailbox**, or to edit an existing mailbox record, open the mailbox record.
4. In the mailbox record, specify the following details.

| FIELDS | DESCRIPTION |
|---|---|
| **General** | |
| Name | Type a meaningful name for the mailbox. |
| Owner | Shows the owner of the mailbox. For a user mailbox that is automatically populated, the owner of the mailbox is the user itself. For a queue mailbox that is automatically populated, the owner of the mailbox is the owner of the queue record. |

| FIELDS | DESCRIPTION |
| --- | --- |
| Email address | Type the email address for the forward mailbox, such as forwardmailbox@contoso.com.<br><br>For a user or a queue mailbox, the email address is the same as that specified in the corresponding user or queue record form. If you edit the email address here, the email address in the user or queue record is updated automatically. |
| Delete Emails After Processing | Specify if you want to delete email from the mailbox after processing. This field is available and can be set to **Yes** only for a forward mailbox and a queue mailbox. |
| Regarding | Select the user or queue that the mailbox is associated with. This field is empty and cannot be set for a forward mailbox. |
| Is Forward Mailbox | This field indicates whether the mailbox record is a forward mailbox. When set to **No**, it indicates that the mailbox record is associated to an individual user or queue in Dynamics 365. |
| **Credentials** | |
| Allow to Use Credentials for Email Processing | Click or tap **Yes** if the email server profile associated to this mailbox has **Authenticate Using** set to **Credentials Specified by a User or Queue**. You must provide the username and password when this field is set to **Yes**. These credentials will be used to send and receive email from the mailbox on the email server. **Note:** To ensure the credentials are secured in Dynamics 365, SQL encryption is used to encrypt the credentials stored in the mailbox if you're processing email by using server-side synchronization. |
| **Synchronization Method** | |
| Server Profile | Select the email server profile that is used for email processing for this mailbox.<br><br>For information on choosing a synchronization method, see: Integrate your email system with Microsoft Dynamics 365 |
| Incoming Email | Select the delivery method for incoming email. This will determine how incoming email will be accessed for this mailbox.<br><br>- None. Email won't be received.<br>- Forward Mailbox. Email will be received using a forward mailbox.<br>- Microsoft Dynamics 365 for Outlook. Email is received by using Dynamics 365 for Outlook.<br>- Server-Side Synchronization or Email Router. Email is received by using server-side synchronization or the Email Router. |

| FIELDS | DESCRIPTION |
|---|---|
| Outgoing Email | Select the delivery method for outgoing email. This determines how outgoing email will be sent for this mailbox.<br><br>- None. Email won't be sent.<br>- Microsoft Dynamics 365 for Outlook. Email is received by using Dynamics 365 for Outlook.<br>- Server-Side Synchronization or Email Router. Email is sent by using server-side synchronization or Email Router. **Note:** For a forward mailbox, only **None** is allowed. |
| Appointments, Contacts, and Tasks | Select whether you want to use Dynamics 365 for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks in Dynamics 365.<br><br>If you select **None**, appointments, contacts, and tasks won't be synchronized. |
| **Configuration Test Results** | |
| Incoming Email Status | Show the result of the email configuration test for incoming email. The various statuses can be:<br><br>- Not Run. The email configuration test has not been run for this mailbox.<br>- Success. The incoming email has been configured and email can be received for this mailbox.<br>- Failure. The incoming email has been configured but it is not possible to pull email from the corresponding configured mailbox. |
| Outgoing Email Status | Show the result of the email configuration test for outgoing email. The various statuses can be:<br><br>- Not Run. The email configuration test hasn't been run for this mailbox.<br>- Success. The outgoing email has been configured and email can be sent from this mailbox.<br>- Failure. The outgoing email has been configured but it's not possible to send email from the corresponding configured mailbox. |
| Appointments, Contacts, and Tasks Status | Show the result of the synchronization of appointments, contacts, and tasks. The various statuses can be:<br><br>- Not Run. The synchronization has not been tested for this mailbox.<br>- Success. Appointments, contacts, and tasks can be synchronized for this mailbox.<br>- Failure. Appointments, contacts, and tasks can't be synchronized for this mailbox. |
| Mailbox Test Completed On | This field shows the date and time when the email configuration was tested for this mailbox record. |

5. Click or tap **Save** or **Save & Close**.

# Configure Outlook or Exchange folder-level tracking

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can enable folder-level tracking for Microsoft Exchange folders to map an Exchange inbox folder to a Dynamics 365 record so that all the emails in the Exchange folder get automatically tracked against the mapped record in Dynamics 365. Consider an example where you have an account called Adventure Works in Dynamics 365. You can create a folder in your Outlook called Adventure Works under your Inbox folder, and create some Exchange rules to automatically route the emails to the Adventure Works folder based on the subject or the body of an email. Next, in Dynamics 365 you can map your Exchange folder (Adventure Works) with the account record (Adventure Works) to automatically track all the emails in Dynamics 365 that land in the Adventure Works Exchange folder, and set the regarding object as the Adventure Works account record in Dynamics 365.

> **TIP**
> Check out the following video: Folder Level Tracking in CRM Online 2015 Update 1

## Enable folder-level tracking

1. In Dynamics 365, click **Settings** > **Email Configuration**.
2. Click **Email Configuration Settings**.
3. Confirm that **Process Email Using** is set to **Server-Side Synchronization**.
4. Enable **Use folder-level tracking from Exchange folders (server-side synchronization must be enabled)**.
5. Configure other tracking options on this page, and then click **OK**.

Once you've enabled folder-level tracking, users will need to configure folder-tracking rules in Dynamics 365 with Settings ( ) > **Options** > **Email** > **Configure Folder Tracking Rules**.

## Some important points about folder-level tracking

- Folder-level tracking of emails will work only if your organization is configured to use server-side synchronization for emails. Server-side synchronization must be configured for Exchange (and not POP3) mailboxes. For more information, see Set up server-side synchronization of email, appointments, contacts, and tasks.
- You can track emails only in folders under your Inbox folder in Exchange. Other folder emails cannot be tracked.
- You can track up to a maximum of 25 folders per user account.
- Any manual changes done to the regarding object in the tracked activity records in Dynamics 365 will be overridden the next time server-side synchronization kicks in. For example, if you have set up a mapping between the Adventure Works folder and the Adventure Works account, all the emails in the Adventure Works Exchange folder will be tracked as activities in Dynamics 365 with the regarding set to the Adventure Works account record. If you change the regarding to some other record, it will automatically be overridden

the next time server-side synchronization occurs. To change the regarding for any email, move the email to a different folder such as the Inbox.

**See also**

System Settings dialog box - Email tab

# Use Outlook category to track appointments and emails

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online) version 8.2

Server-side synchronization now allows tracking of emails, appointments and tasks in Outlook with a special category **Tracked to Dynamics 365**. Assigning this category to an email, appointment or a task in Outlook syncs the item to Dynamics 365. Similarly, removing the category from a tracked email, appointment or task untracks it from Dynamics 365.

You can also select multiple items and assign the **Tracked to Dynamics 365** Outlook category to them thereby tracking all of them to Dynamics 365. Quickly identify tracked items by observing the presence of this category in your Inbox and other folders.

## Configure category-based tracking through an OrgDBOrgSetting

To enable the special **Tracked to Dynamics 365** Outlook category, you need to enable the OrgDBOrgSetting in your Dynamics 365 organization. Dynamics 365 provides the OrgDBOrgSettings tool that gives administrators the ability to implement specific updates that were previously reserved for registry implementations.

1. Follow the instructions in this article for steps to extract the tool.
2. After extracting the tool, enable the OrgDBOrgSetting **TrackCategorizedItems**.
3. Enabling the OrgDBOrgSetting will create the category **Tracked to Dynamics 365** on all Exchange mailboxes of the Dynamics 365 organization which have server-side synchronization enabled in about 15 minutes.

You can also use this tool to edit the OrgDBOrgSetting **TrackCategorizedItems**.

> **NOTE**
> Once the category **Tracked to Dynamics 365** is created, it can be renamed without losing the associated tracking capability. If you delete the category, server-side synchronization will attempt to recreate the category in about 15 minutes.

## Use category to track Outlook items

Once the **Tracked to Dynamics 365** category is available in Outlook, you can use it to track the following Outlook items.

## Email

Track an email by assigning it the **Tracked to Dynamics 365** category. The category assignment can be seen immediately in Outlook. At this time, the email is marked for tracking. server-side synchronization will sync the email to Dynamics 365 within 15 minutes, based on the email synchronization setting.

If an email is tracked and is categorized as **Tracked to Dynamics**, removing the category will untrack the email. However, the corresponding Dynamics 365 email activity record is not deleted.

> **NOTE**
>
> You can set up a rule in Outlook to assign or remove a category. See Manage email messages by using rules.

## Appointment

You can track an appointment by assigning it the **Tracked to Dynamics 365** category. The appointment will be tracked and synced to Dynamics 365 based on server-side synchronization rules.

If an appointment is tracked and is categorized as **Tracked to Dynamics**, removing the category will untrack the appointment. However, the corresponding Dynamics 365 appointment activity record is not deleted.

## Task

> **NOTE**
>
> Assignment of tasks to people that is captured in Outlook will not be synced to Dynamics 365.

## Use category-based tracking with App for Outlook

If you have Dynamics 365 App for Outlook, you can use category-based tracking with App for Outlook.

The following table lists different scenarios of tracking.

| ACTION | RESULT |
|---|---|
| Assign the **Tracked to Dynamics 365** category to an email/appointment | Server-side synchronization will sync email/appointment within 15 minutes. Loading App for Outlook on that item will display the tracked status. |
| Track an email/appointment using App for Outlook | Email/Appointment is tracked. The **Tracked to Dynamics 365** category is assigned immediately. |
| Removal of the **Tracked to Dynamics 365** category on an email/appointment | Server-side synchronization will untrack the item in about 15 minutes. Loading App for Outlook on that email will display the tracked status. The activity record is not deleted from Dynamics 365. |
| Untrack an email/appointment using App for Outlook | Email/Appointment is untracked and **Tracked to Dynamics 365** category is removed. |

## Delegate users

If you allow someone else to manage your email and calendar by providing them delegate access, the delegate can access your categories in Outlook, if the delegate has Editor permissions.

If your mailbox has the **Tracked to Dynamics 365** category, the delegate can track your emails and appointments by assigning the **Tracked to Dynamics 365** category.

## Category-based tracking with Dynamics 365 for Outlook

Category-based tracking is not supported with Dynamics 365 for Outlook. We recommend that you do not enable OrgDBOrgSetting **TrackCategorizedItems** on a Dynamics 365 organization set up to use Dynamics 365 for Outlook.

## Disable category-based tracking

You can disable category-based tracking for the Dynamics 365 organization by disabling OrgDBOrgSetting **TrackCategorizedItems**.

> **NOTE**
>
> If you disable OrgDBOrgSetting **TrackCategorizedItems**, the **Tracked to Dynamics 365** category is soft-deleted, with the category assignment retained in Outlook. If you delete the category from the master list, it will be deleted permanently.

## FAQ

**Can I track my Outlook contacts by assigning the Tracked to Dynamics 365 category?**
No, category-based tracking is not supported for Outlook contacts.

**What happens if I rename the Tracked to Dynamics 365 category?**
If you rename the category, server-side synchronization will continue to identify the category by its ID and it will be used to track and untrack Outlook items.

**What happens if I delete the Tracked to Dynamics 365 category?**
If you delete the category, server-side synchronization will recreate it on the Exchange server in about 15 minutes.

**When I turn on OrgDBOrgSetting TrackCategorizedItems for the first time, will my previously tracked items be assigned the Tracked to Dynamics 365 category?**
No, server-side synchronization will not go back in time to assign the category to already tracked items.

**If I assign the Tracked to Dynamics 365 category to an Outlook conversation thread, what happens?**
If you categorize a conversation thread as **Tracked to Dynamics 365**, all the emails in that thread are assigned the category and hence will be tracked.

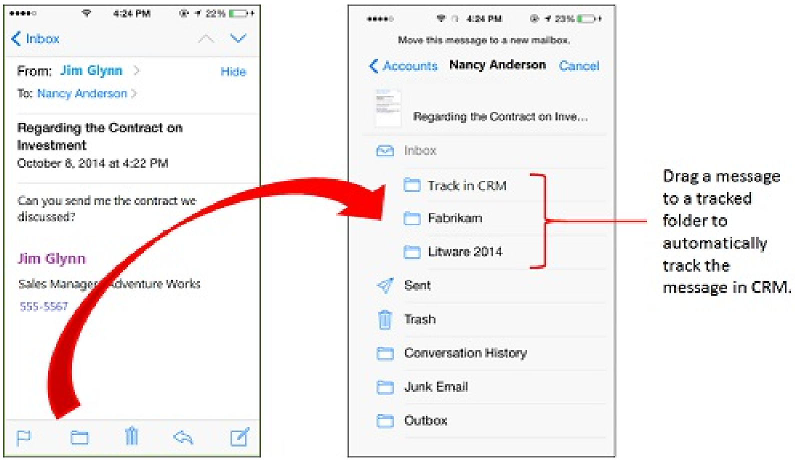
**Can I assign Tracked to Dynamics 365 category to recurring appointments?**
If you categorize a recurring appointment as **Tracked to Dynamics 365**, all the individual instances of the appointment are assigned the category and will be tracked.

# Track Outlook email by moving it to a tracked Exchange folder

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Track customer interactions wherever you are, and from virtually any device by using folder tracking. After you set up a tracked folder, you can drag or move email to that folder to track it automatically in Dynamics 365. Additionally, if you set a regarding record (such as a specific account or opportunity record) for the folder, Dynamics 365 automatically links all email in that folder to that specific record. Tracked folders work in Exchange Online, Outlook on the web, or any other mobile app that supports Exchange.




> **TIP**
>
> Tracked folders work with Exchange Inbox rules. This makes it easy to automatically route email messages to a particular folder. For example, set up an Exchange rule that automatically routes email from a Contoso contact to a tracked Contoso folder, which is linked to a specific Contoso opportunity. Tell me more about setting up rules.

To see folder tracking in action, see the video Folder Level Tracking in CRM Online .

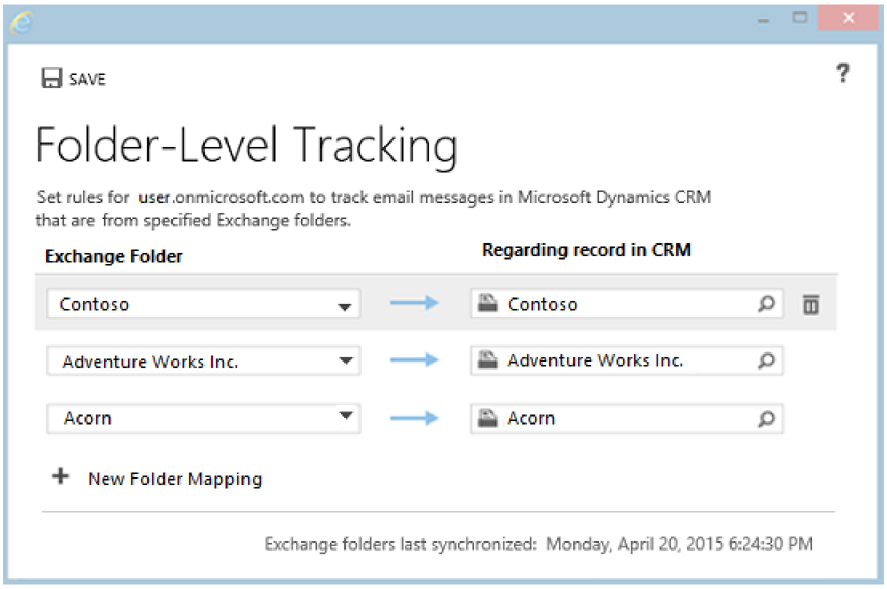
## Requirements for using tracked folders

- The tracking folders feature must also be enabled by your administrator. For more information, contact your Dynamics 365 administrator. For admin information on enabling tracked folders, see Configure folder-level tracking.
- Your organization must use server-side synchronization as your email synchronization method. If you don't know which synchronization method your organization uses, contact your Dynamics 365 administrator. For admin information about setting up server-side synchronization, see Set up server-side synchronization.

## Set up a tracked folder

1. In the web app, on the nav bar, click **Options** .
2. In the **Set Personal Options** dialog box, click the **Email** tab, and then under **Select the email messages to track in Dynamics 365**, click **Configure Folder Tracking Rules**.

3. In the **Folder-Level Tracking** dialog box, under **Exchange Folder**, click **+ New Folder Mapping**, click the down arrow in the box that appears, and then select the folder you want to track.




> **NOTE**
>
> You can only track folders or subfolders inside your Exchange Inbox. Only the folder you select will be tracked. For example, if you select a folder that includes subfolders, the subfolders aren't tracked unless you specifically select them in this dialog box. The maximum number of folders you can track is 25.

4. If you want to link the folder to a specific record—for example, an account or opportunity—under **Regarding Record in Dynamics 365**, click the **Lookup** button, and then search for the record.

5. Repeat steps 3 and 4 for any additional folders you want to track and (optionally) link to regarding records.

6. When you're done adding and linking folders, click **Save**.

## Best practices for folder tracking

- Make sure to take advantage of folder tracking on your mobile devices. If your device supports Exchange email, folder tracking will work automatically. You don't need to install anything. Just drag or move email to a tracked folder to automatically track that email in Dynamics 365.

- Whether you set a regarding record for a folder or not depends on how you plan to use the folder:

  - If you receive a small volume of email from many different customers, you may want to create a single folder called "Track in Dynamics 365" (or similar name) that isn't linked to a particular record. That way, you can drag messages to that folder to track them automatically. If you later want to link an email message in that folder to a specific Dynamics 365 record, open that activity record in Dynamics 365, and then fill in the Regarding field.

  - If you receive large volumes of email from a particular customer, create a folder (or use an existing folder) just for that customer and link it to a specific record. For example, create a Contoso folder and set the regarding record to a Contoso account record or opportunity record.

- Any email in response to email that has been tracked will only be auto tracked if the response email is in the Inbox folder. If it has been moved manually or via Outlook rules into a sub-folder within Inbox, it will not be tracked automatically. Workaround: (1) do not use rule-based folder routing or (2) do not manually move email from a folder to the Inbox for any email response that you think needs to be tracked in Dynamics 365.

- You can set up multiple folders that link to the same regarding record. For example, you could link a Contoso Sales Proposal folder and a Contoso Legal Matters folder to the same Contoso account record.
- It's best not to use the same folder for different records over a period of time. For example, let's say you're tracking email communications for an opportunity with Customer 1, but you've won the opportunity, and now you don't need to track further communications with that customer. You may be tempted to simply change the regarding record for that folder to a new customer (Customer 2) you're working with. If you do that, however, all email in that folder, including the email pertaining to Customer 1, will be associated with Customer 2. So it's best in this case to create a new folder associated with Customer 2, and then set the regarding record for that new folder to Customer 2. Then you can delete the regarding record for the Customer 1 folder.
- You can include an untracked folder inside a tracked folder. For example, let's say you want to store personal email from a Contoso contact. You can create a Personal subfolder under the Contoso folder and leave it untracked.
- If you no longer need to track a folder, it's a good idea to untrack it for performance reasons. To untrack a folder, remove it from the **Folder-Level Tracking** dialog box.

## What happens when you untrack, move, delete, or rename folders, or change the regarding record?

The following table shows what happens when untrack, move, or delete folders, or change the regarding record linked to a tracked folder.

| | |
|---|---|
| **Action** | **Result** |
| Untrack a folder by deleting it from the **Folder-Level Tracking** dialog box | All email messages previously included in that folder will still be tracked, and the regarding record will still be linked to those email messages. New email messages you add to that folder won't be tracked. |
| Delete a folder from Outlook or Exchange | All email messages included in that folder will be deleted from Outlook or Exchange Online. Email messages already tracked through that folder will not be deleted from Microsoft Dynamics 365, however. |
| Move a folder in Outlook or Exchange | The folder and all its contents will continue to be tracked. If you move a folder outside your Inbox, folder-level tracking rules will be disabled. |
| Rename a folder in Outlook or Exchange | The folder and all its contents will continue to be tracked. **Tip:** When you rename folders, the software uses the Exchange folder ID for tracking purposes – it's not dependent on the actual name of the folder. This is important to know if you delete a folder, and then rename a new folder with the same name as the deleted folder. For example, let's say you delete Folder 1, create Folder 2, and then rename Folder 2 to be Folder 1. The tracking information for the original Folder 1 won't be retained in this case. |
| Remove the link between a tracked folder and a specific record by deleting the link in the **Folder-Level Tracking** dialog box | All messages in that folder that were previously linked will continue to be linked. New messages added to that folder won't be linked. |

| | |
|---|---|
| Move an email message in a tracked folder that's linked to a specific record to a different folder | If the new folder doesn't have a regarding record, the email message will continue to be linked to the original record. If the new folder has a regarding record, the email message will be linked to that regarding record. |
| Manually change the regarding record for an email message that's linked to a different regarding record through a tracked folder | The tracked folder rule takes precedence. When the folder is synchronized, the email message will be re-linked to the record specified in the folder tracking rule, even if you change the regarding record manually. To change the regarding record in this case, do one of the following:<br><br>- Move the message to a tracked folder linked to the record you want.<br>- Remove the link to the regarding record in the **Folder-Level Tracking** dialog box before you manually change the regarding record.<br>- Move the specific email message outside the tracked folder, and then manually change the regarding record for that email message. |
| Two users move the same email message to separate folders that have different regarding records | You can only set one regarding record for an email message. In this case, the record that's processed first is linked to the regarding record. |

### See also

Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook
Configure folder-level tracking

# Set incoming and outgoing email synchronization

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You have several options for synchronizing email messages with Dynamics 365. Use the following information to deploy the best option for your company.

## Set the synchronization method

You can set the default synchronization method applied to all newly created user mailboxes:

1. Go to **Settings** > **Email Configuration**
2. Click the **Email Configuration Settings** > **Email tab**.

You can set the synchronization method for individual mailboxes:

1. Go to **Settings** > **Email Configuration**
2. Click **Mailboxes** > select a mailbox.

For information on picking a synchronization method, see Integrate your email system with Dynamics 365.

## Incoming email messaging options

The available incoming email configurations that you can use when a user or a queue receives Dynamics 365 email messages are as follows:

- **None**. Use this option for users or queues that do not use Dynamics 365 to track received email messages.
- **Dynamics 365 for Outlook**. This option is available for users and requires that Office Outlook be installed on the user's computer. This option does not require the Email Router component and is not available for queues.
- **Server-Side Synchronization or Email Router**. When you select this option, the server-side synchronization or Email Router will process Dynamics 365 email messages directly from the user's or queue's inbox, without using a forward or a sink mailbox. Although this option does not require a sink mailbox, it does make troubleshooting server-side synchronization or Email Router issues more complex for larger user bases (10 or more users) because each incoming email message is processed by the server-side synchronization or Email Router in every user's mailbox instead of in a single dedicated mailbox.
- **Forward Mailbox**. To use this option, you must install the Email Router. This option requires a *sink* mailbox, which is a dedicated mailbox that collects email messages transferred from each Dynamics 365 user's mailbox by a server-side rule. Although this option does not require users to run Outlook, it does require that the rule be deployed for each user. You use the Rule Deployment Wizard to deploy rules to each Dynamics 365 user mailbox.

## Outgoing email messaging options

The available outgoing email configurations that you can use when users or queues send Dynamics 365 email messages are as follows:

- **None**. Use this option for users or queues that do not use Dynamics 365 to send email messages.
- **Dynamics 365 for Outlook**. This option is available for users and requires that Office Outlook be installed on the user's computer. This option does not require the Email Router component and is not available for queues.
- **Server-Side Synchronization or Email Router**. This option delivers Dynamics 365 email messages by using the server-side synchronization or Email Router component. The email system must be SMTP-compliant. The server-side synchronization or Email Router can be installed on the SMTP server or on a different computer that has a connection to the SMTP server.

**See also**

Forward mailbox vs. individual mailboxes

# Choose the records to synchronize between Dynamics 365 and Exchange

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 uses online synchronization filters to determine which records to synchronize between Dynamics 365 and Exchange (using server-side synchronization). You can modify the existing online synchronization filters or create new filters to synchronize certain types of records. You can also delete, deactivate, or activate filters.

Email is not included in the synchronization filters because email is controlled by when the email is created in Dynamics 365, whether the user is on the recipient list or not.

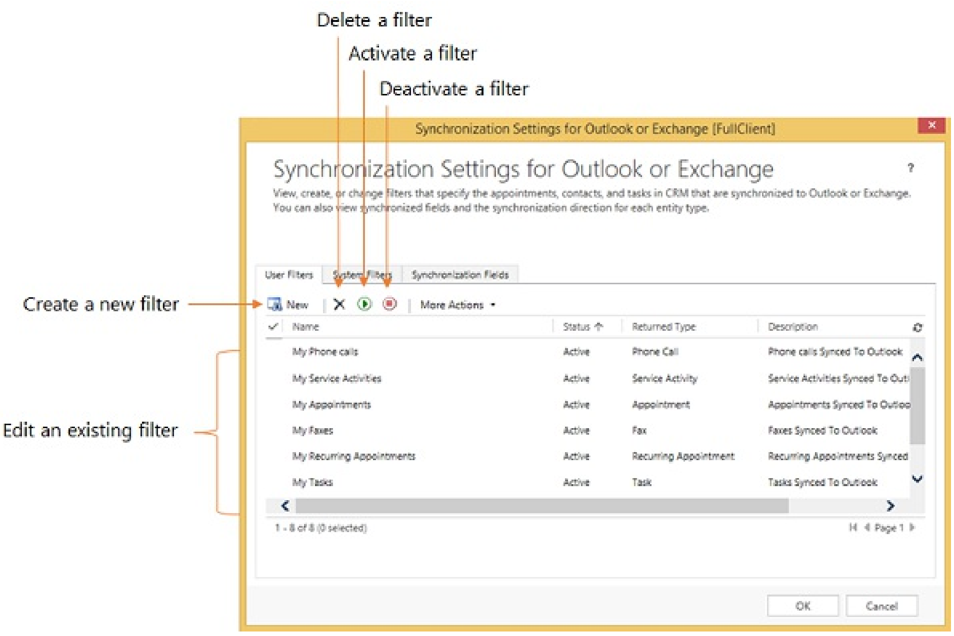
## Create or modify online synchronization filters

1. In the web app, in the upper-right corner of the screen, click the **Settings** button > **Options**.

2. In the **Set Personal Options** dialog box, click the **Synchronization** tab.

3. Under **Synchronize Dynamics 365 items with Outlook or Exchange**, click the **filters** link.

   Dynamics 365 displays the **Synchronization Settings for Outlook or Exchange** dialog box with the **User Filters** tab selected. You can use this tab to create or edit a filter, or to delete, activate, or deactivate a filter.




> **NOTE**
>
> If you're a system administrator, you can create or modify organization-wide filters (system filters) through the SDK. More information: Tell me more about system filters

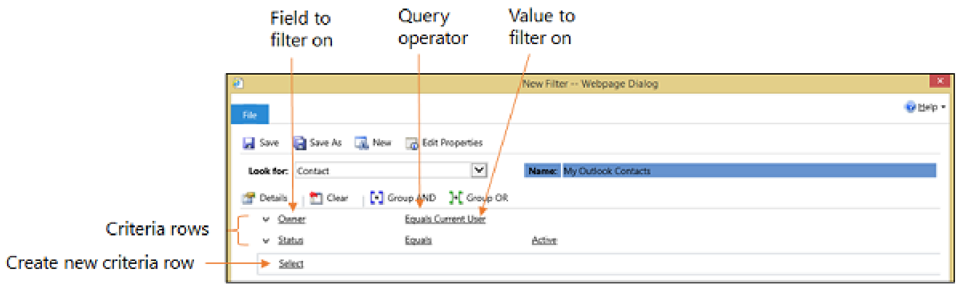
4. Do one of the following:

   - To open an existing filter, click the filter.

- To create a new filter, click **New**.

# Create or modify filter criteria

You use a criteria row to create or modify criteria in an offline synchronization filter. Each criteria row contains three values: the field to use in the filter (for example, **City**), an operator (for example, **Equals** or **Contains**), and the value to filter on (for example, **WA**).




**Add a criteria row**

1. In the **Look for** list, select a record type.
2. Point to **Select** in the criteria grid, and then select the field to filter on from the list.
3. Select an operator from the list.
4. Enter a value to filter on.

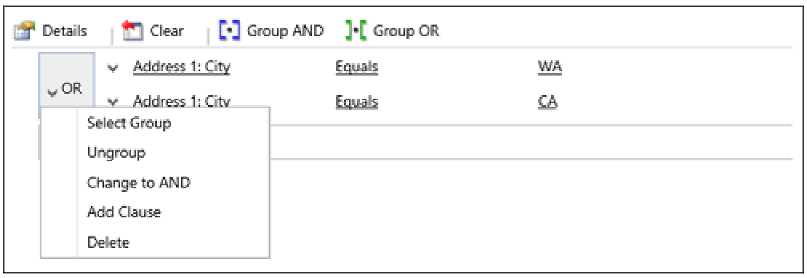
**Group rows of criteria**

1. For each row you want to group, click the down arrow to the left of the field name, and then click **Select Row**.

   To remove a row from a group, click the down arrow to the left of the field name, and then click **Delete**. To clear all rows from the criteria grid, click **Clear**.

2. Click **Group AND** or **Group OR**.

   After creating a group, you can click the down arrow next to the **And** or **Or** to select from different options. You can select a group, ungroup the group, change a Group AND to a Group OR or vice versa, add a clause, or delete a group.




## See also

[Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook]

# Control field synchronization with Outlook

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

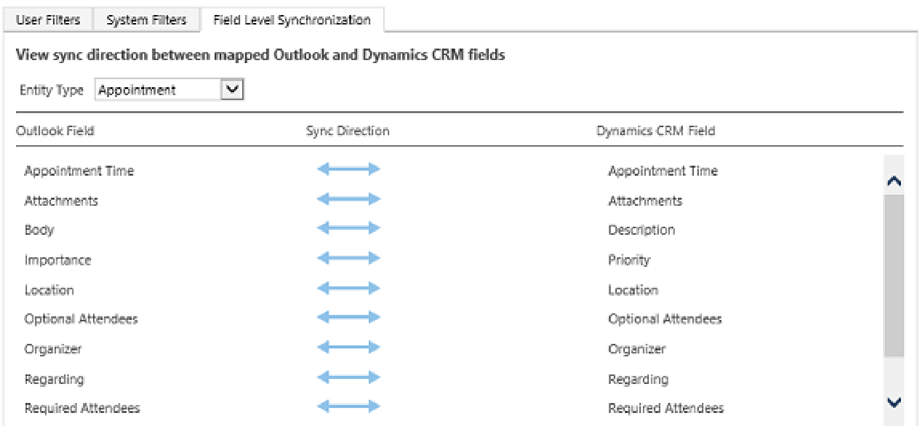
With field synchronization, admins can set the sync direction between Dynamics 365 and Microsoft Dynamics 365 for Outlook fields. You can control synchronization when using either Outlook synchronization or server-side synchronization (Exchange).

For example, a salesperson may want to take personal notes about a contact and not want the notes to synchronize with Dynamics 365 data available to all users. You can set the Personal Notes field for contacts in Outlook to not Dynamics 365 for Outlook with Dynamics 365 so the salesperson's notes will remain private.

> **TIP**
> Check out the following video: Configurability in Synchronizing Data with Outlook or Exchange in Microsoft Dynamics CRM 2015

## Set field synchronization between Dynamics 365 and Outlook

1. In the web app, in the upper-right corner of the screen, click the **Settings** button > **Options**.
2. In the **Set Personal Options** dialog box, choose the **Synchronization** tab.
3. Choose **synchronized fields**.
4. For the fields you want to change synchronization, choose the arrows in the Sync Direction column. Each choice will change the direction.




> **TIP**
> Hover over a field name to see the fields mapped to it.

5. Choose **OK** > **OK** to close the open dialog boxes.

   Let your users know they can view (not change) the synchronization settings. More information: What fields can be synchronized between Dynamics 365 and Outlook?

## Performance and synchronization

Configuring synchronization might have an impact on the time it takes to sync between Dynamics 365 for Outlook and Dynamics 365. You should test your configuration before deploying to ensure satisfactory sync times.

## Permissions and synchronization

Role-based security controls access to a specific entity type, record-based security controls access to individual records, and field-level security controls access to specific fields. All these can impact what is synchronized between Dynamics 365 and Dynamics 365 for Outlook or Exchange.

Best practice is to review the security settings for these security methods to ensure field synchronization is processes as desired. For more information see:

- Securing roles: Create or edit a security role
- Securing fields: Add or remove security from a field

More information: How field security affects synchronization between Dynamics 365 and Outlook and Security concepts for Microsoft Dynamics 365

**See also**

# How field security affects synchronization with Outlook

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Securing a field in Dynamics 365 with field level security can impact synchronization between Dynamics 365 and Microsoft Dynamics 365 for Outlook. Consider the following scenario.

> **NOTE**
>
> We do not recommend securing a field in Dynamics 365 when the field is set to sync. Best practice is to NOT secure any sync fields. If you do decide to secure sync fields, you'll need to do the following:
>
> 1. Secure the field using field level security. More information: see "Set field level security" below.
> 2. Change the sync direction so that sync does not attempt to update or write the field during synchronization. More information: Control field synchronization between Dynamics 365 and Outlook or Exchange

## Scenario: Restrict users from changing Job Title

The Contoso company wants to promote consistent data entry. While sales personnel are out in the field, it's easy for them to create different data entries to describe the same thing. For example, the same job title could be entered as "Construction Manager", "Foreman", or "Site Manager". To prevent this, the Job Title field is secured. This has consequences for synchronization.

### Set field level security

John, the Dynamics 365 admin for Contoso, sets security on several fields.

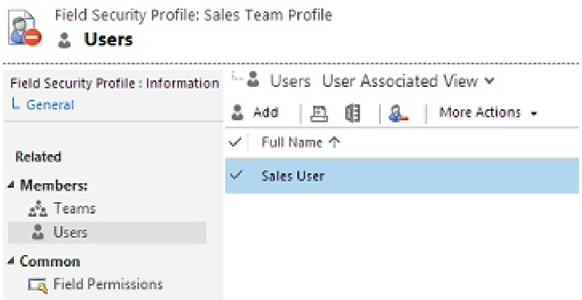

He did the following steps:

1. Go to **Settings** > **Customizations**.
2. Choose **Customize the System**.
3. Expand **Entities** > **Contact**.
4. Choose **Fields** and select **jobtitle**. There are a lot of Contact fields so you'll need to advance several pages.
5. Choose **Edit**.
6. For Field Security, choose **Enable** > **Save and Close**.
7. Choose **Publish All Customizations**.

   John also secured the following Contact fields so they won't appear in Dynamics 365: ftpsiteurl, governmentid

### Create and configure a field security profile

John creates a field security profile and assigns sales team members to the profile.

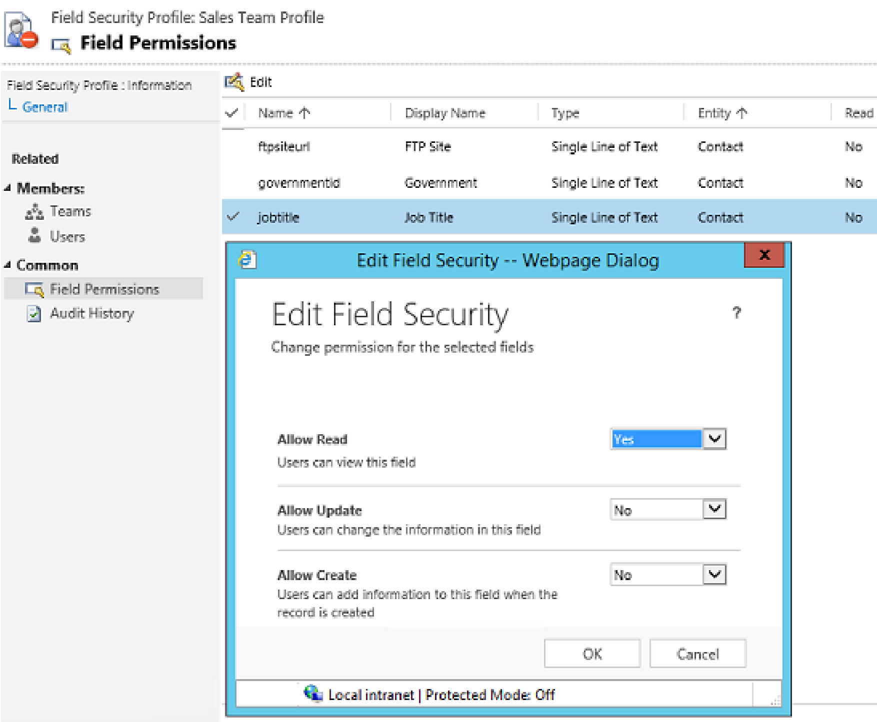



He did the following to create the field security profile:

1. Go to **Settings** > **Security**.
2. Choose **Field Security Profiles**.
3. Create a profile. Choose **New** and enter a Name.
4. Choose **Save and Close**.
5. Choose the new profile > **Users** > **Add**
6. Select users and then choose **Select** > **Add**.

### Set field permissions

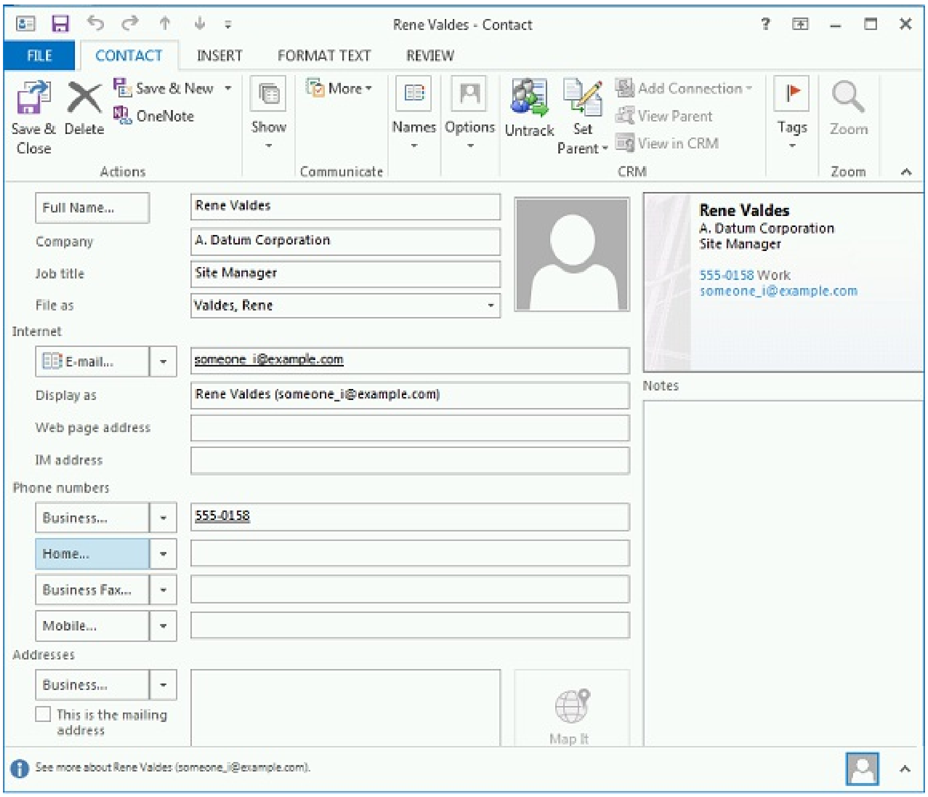
With a field security profile created and users added to the profile, John can now set permissions on the fields to match his organization's requirements.



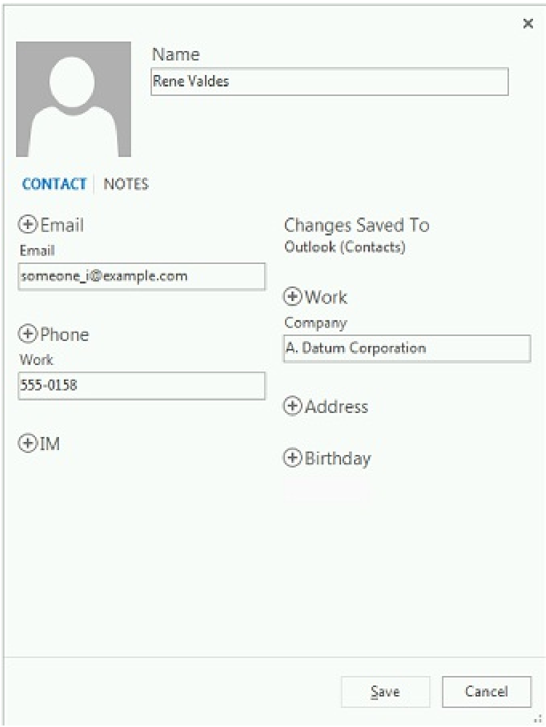

1. Go to **Settings** > **Security**.
2. Choose **Field Security Profiles** > your profile.
3. Choose **Field Permissions** > the field to secure > **Edit**
4. Change the security settings to match your company's requirements and then choose **OK** > **Save and Close**.

### What the user sees

Nancy, a salesperson at Contoso, uses Dynamics 365 for Outlook and creates a new contact and tracks it in Dynamics 365.

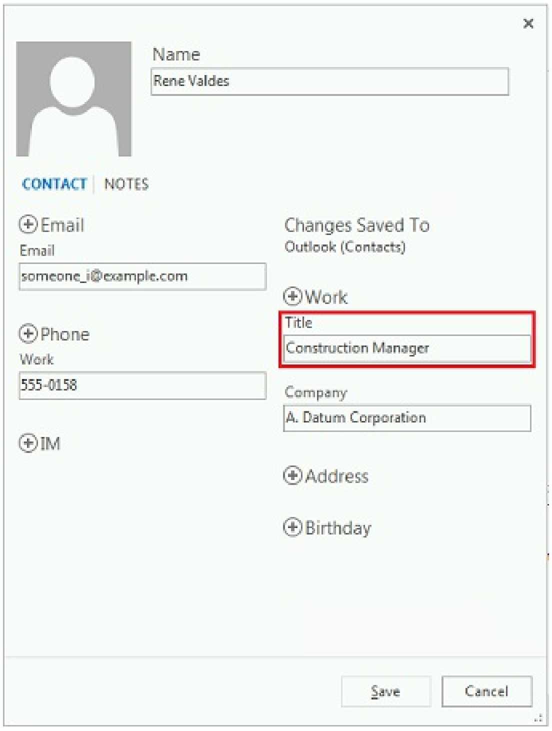



When Nancy synchronizes with Dynamics 365, she notices that the Job Title field is gone from the contact. This is because Nancy doesn't have update rights for the Job Title field.




Nancy's manager, with update rights to the Job Title field, fills in the field with the correct job title: Construction Manager.

Nancy synchronizes again with Dynamics 365 and now the Job Title field is in the contact with the correct title.




## See also

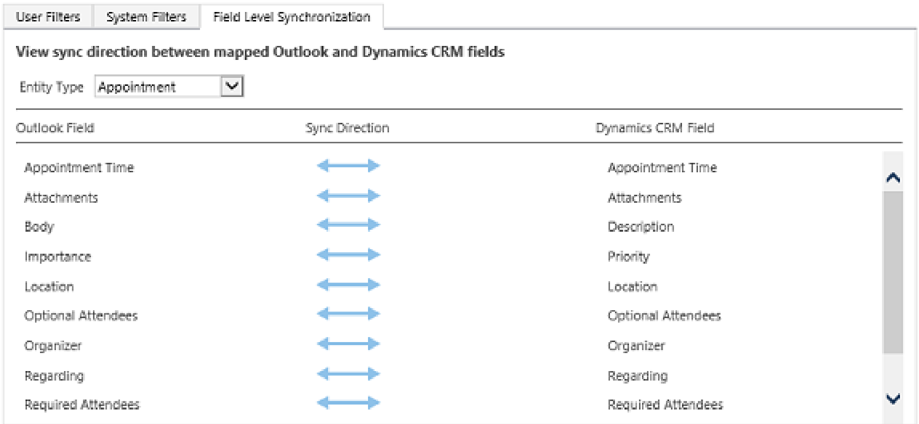
Field level security

# What fields can be synchronized with Outlook?

8/24/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 administrators can set whether a sync occurs and the sync direction for Dynamics 365 and Microsoft Dynamics 365 for Outlook fields.




You can set synchronization for the entities listed in the following tables. For information on how to set field synchronization, see Control field synchronization between Dynamics 365 and Outlook or Exchange

## Entity: Appointment

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Appointment Time | ↔ | ↔ | Appointment Time | Aggregation of Start Time, End Time, Duration, All Day Event, etc. |
| Attachments | ↮ | Computed | Attachments | Changes to ↔ based on System Settings. |
| Body | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Importance | ↔ | ↔ | Priority | Outlook has High Importance, Low Importance. |
| Location | ↔ | ↔, →, ←, ↮ | Location | |
| Optional Attendees | ↔ | ↔ | Optional Attendees | |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Organizer | ↔ | ↔ | Organizer | See below. |
| Regarding | ↔ | ↔ | Regarding | See below. |
| Required Attendees | ↔ | ↔ | Required Attendees | |
| Show Time As | ↔ | ↔ | Appointment Status | |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

**Notes**

1. **Organizer:** In Outlook sync, an appointment created in Dynamics 365 will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity. In server-side sync, a service activity created in Dynamics 365 will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

## Entity: Contact

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Anniversary | ↔ | ↔, →, ←, ↮ | Anniversary | |
| Assistant’s Name | ↔ | ↔, →, ←, ↮ | Assistant | |
| Assistant’s Phone | ↔ | ↔, →, ←, ↮ | Assistant Phone | |
| Birthday | ↔ | ↔, →, ←, ↮ | Birthday | |
| Business Fax | ↔ | ↔, →, ←, ↮ | Fax | |
| Business Phone | ↔ | ↔, →, ←, ↮ | Business Phone | |
| Business Phone 2 | ↔ | ↔, →, ←, ↮ | Business Phone 2 | |
| Callback | ↔ | ↔, →, ←, ↮ | Callback Number | |
| Children | ↔ | ↔, →, ←, ↮ | Children’s Names | |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Company Main Phone | ↔ | ↔, →, ←, ↮ | Company Phone | |
| Department | ↔ | ↔, →, ←, ↮ | Department | |
| E-mail | ↔ | ↔, →, ←, ↮ | Email | |
| E-mail 2 | ↔ | ↔, →, ←, ↮ | Email Address 2 | |
| E-mail 3 | ↔ | ↔, →, ←, ↮ | Email Address 3 | |
| FTP Site | ↔ | ↔, →, ←, ↮ | FTP Site | |
| Full Name | ↔ | | Full Name | |
| Government ID Number | ↔ | ↔, →, ←, ↮ | Government | |
| Home Address | ↔ | ↔, →, ←, ↮ | Address 2 | Changes to ↔ based on System Settings. |
| Home Phone | ↔ | ↔, →, ←, ↮ | Home Phone | |
| Home Phone 2 | ↔ | ↔, →, ←, ↮ | Home Phone 2 | |
| Job Title | ↔ | ↔, →, ←, ↮ | Job Title | |
| Mailing Address/Business Address | ↔ | ↔, →, ←, ↮ | Address 1 | Mailing Address changes to Business Address based on System Settings. |
| Manager's Name | ↔ | ↔, →, ←, ↮ | Manager | |
| Mobile | ↔ | ↔, →, ←, ↮ | Mobile Phone | |
| Nickname | ↔ | ↔, →, ←, ↮ | Nickname | |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Notes | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Other Address | ↔ | ↔, →, ←, ↮ | Address 3 | Changes to ↔ based on System Settings. |
| Other Phone | ↔ | ↔, →, ←, ↮ | Telephone 3 | |
| Pager | ↔ | ↔, →, ←, ↮ | Pager | |
| Parent (Regarding) | ↔ | | Company Name (Regarding) | See Notes below. |
| Spouse/Partner | ↔ | ↔, →, ←, ↮ | Spouse/Partner Name | |
| Web Page | ↔ | ↔, →, ←, ↮ | Website | |
| Yomi First Name | ↔ | ↔, →, ←, ↮ | Yomi First Name | |
| Yomi Last Name | ↔ | ↔, →, ←, ↮ | Yomi Last Name | |

### Notes

1. **Parent (Regarding):** When you do a **Set Regarding**, the Company field in Outlook is replaced by the name of the regarding object from Dynamics 365. If not syncing, the set regarding action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Company field in Outlook. Users can control updating the Company field for Outlook contacts in Dynamics 365 for Outlook. More information: Set personal options that affect tracking and synchronization between Dynamics 365 and Outlook or Exchange

2. When the Contact entity is deactivated (**Status Reason: Inactive**), the Outlook field in Outlook will have **Category [Dynamics 365] Inactive**. This is to help differentiate the inactive vs. active status from a pool of tracked Outlook contacts.

## Entity: Fax

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Date Completed | ↔ | ↔, →, ←, ↮ | Actual End | |
| Due Date | ↔ | ↔, →, ←, ↮ | Due Date | See Notes below. |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
| --- | --- | --- | --- | --- |
| Importance | ↔ | | Priority | Outlook has High Importance, Low Importance. |
| Notes | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Regarding | ↔ | | Regarding | See Notes below. |
| Start Date | ↔ | ↔, →, ←, ↮ | Start Date | |
| Status | ↔ | | Status | Computed from Activity Status and Status Reason. |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

### Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to Dynamics 365. However, when a task has Due Time set in Dynamics 365, it will be synchronized to reminder time in Outlook.

   If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; If there is Start Date value but no Due Date value in Dynamics 365, Dynamics 365 will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and Dynamics 365 independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

## Entity: Letter

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
| --- | --- | --- | --- | --- |
| Date Completed | ↔ | ↔, →, ←, ↮ | Actual End | |
| Due Date | ↔ | ↔, →, ←, ↮ | Due Date | See Notes below. |
| Importance | ↔ | | Priority | Outlook has High Importance, Low Importance. |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Notes | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Regarding | ↔ | | Regarding | See Notes below. |
| Start Date | ↔ | ↔, →, ←, ↮ | Start Date | |
| Status | ↔ | | Status | Computed from Activity Status and Status Reason. |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

### Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to Dynamics 365. However, when a task has Due Time set in Dynamics 365, it will be synchronized to reminder time in Outlook.

   If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in Dynamics 365, Dynamics 365 will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and Dynamics 365 independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

## Entity: Phone Call

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Date Completed | ↔ | ↔, →, ←, ↮ | Actual End | |
| Due Date | ↔ | ↔, →, ←, ↮ | Due Date | See below. |
| Importance | ↔ | | Priority | Outlook has High Importance, Low Importance. |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Notes | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Regarding | ↔ | | Regarding | See Notes below. |
| Start Date | ↔ | ↔, →, ←, ↮ | Start Date | |
| Status | ↔ | | Status | Computed from Activity Status and Status Reason. |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

### Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to Dynamics 365. However, when a task has Due Time set in Dynamics 365, it will be synchronized to reminder time in Outlook.

   If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in Dynamics 365, Dynamics 365 will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and Dynamics 365 independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

## Entity: Recurring Appointment

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Body | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Importance | ↔ | | Priority | Outlook has High Importance, Low Importance. |
| Location | ↔ | ↔, →, ←, ↮ | Location | |
| Optional Attendees | ↔ | | Optional Attendees | |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Organizer | ↔ | | Organizer | See Notes below. |
| Recurrence Pattern | ↔ | | Recurrence Pattern | |
| Regarding | ↔ | | Regarding | See Notes below. |
| Required Attendees | ↔ | | Required Attendees | |
| Show Time As | ↔ | | Appointment Status | Computed by Activity Status and Status Reason. |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

**Notes**

1. **Organizer:** In Outlook sync, an appointment created in Dynamics 365 will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity. In server-side sync, a service activity created in Dynamics 365 will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

## Entity: Service Activity

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
|---|---|---|---|---|
| Appointment Time | ← | | Appointment Time | Aggregation of Start Time, End Time, Duration, All Day Event, etc. |
| Importance | ← | | Priority | Outlook has High Importance, Low Importance. |
| Location | ← | | Location | |
| Notes | ← | | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Optional Attendees | ← | | Optional Attendees | |
| Organizer | ← | | Organizer | See Notes below. |
| Regarding | ← | | Regarding | See Notes below. |

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
| --- | --- | --- | --- | --- |
| Required Attendees | ← | | Required Attendees | |
| Show Time As | ← | | Appointment Status | Computed by Activity Status and Status Reason. |
| Subject | ← | | Subject | |

**Notes**

1. **Organizer:** In Outlook sync, an appointment created in Dynamics 365 will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity; in server-side sync, a service activity created in Dynamics 365 will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.
2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

# Entity: Task

| OUTLOOK FIELDS | DEFAULT SYNC | SETTABLE SYNC | DYNAMICS 365 FIELD | NOTES |
| --- | --- | --- | --- | --- |
| % Complete | ↔ | ↔, →, ←, ↮ | Percent Complete | |
| Date Completed | ↔ | ↔, →, ←, ↮ | Actual End | |
| Due Date | ↔ | ↔, →, ←, ↮ | Due Date | See Notes below. |
| Importance | ↔ | | Priority | Outlook has High Importance, Low Importance. |
| Notes | ↔ | ↔, →, ←, ↮ | Description | Outlook and Exchange can contain things like images and links. Dynamics 365 can only contain multiple lines of text. |
| Regarding | ↔ | | Regarding | See Notes below. |
| Start Date | ↔ | ↔, →, ←, ↮ | Start Date | See Notes below. |
| Status | ↔ | | Status | Computed from Activity Status and Status Reason. |
| Subject | ↔ | ↔, →, ←, ↮ | Subject | |

**Notes**

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to Dynamics 365. However, when a task has Due Time set in Dynamics 365, it will be synchronized to reminder time in Outlook.

   If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in Dynamics 365, Dynamics 365 will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and Dynamics 365 independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from Dynamics 365. Until you sync, the **Set Regarding** action in Dynamics 365 for Outlook and in Dynamics 365 should not change the Regarding field in Outlook.

3. **Start Date:** When a task is created and tracked in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to Dynamics 365. However, when a task has Due Time set in Dynamics 365, it will be synchronized to Reminder Time in Outlook.

**See also**

# View the fields that are synchronized between Dynamics 365 and Outlook

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

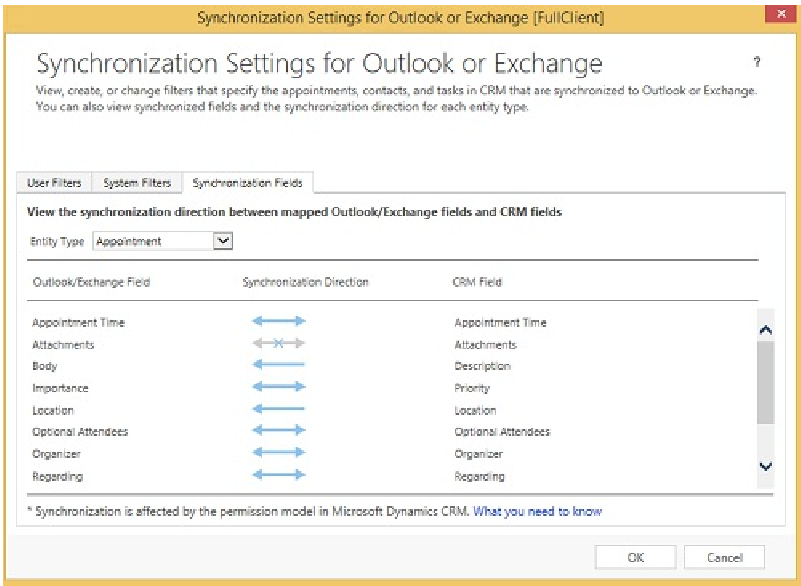
In Microsoft Dynamics CRM 2015 for Outlook or later, you can view the appointments, contacts, and tasks fields that are synchronized between Dynamics 365 and Outlook so you can see where the data is coming from. You can also determine whether the fields:

- Are synchronized one way (from Outlook to Dynamics 365 **or** from Dynamics 365 to Outlook)
- Are synchronized two way (from Outlook to Dynamics 365 **and** from Dynamics 365 to Outlook)
- Aren't synchronized

  For example, if the fields are synchronized one way, from Dynamics 365 to Outlook, you can update the field in Outlook and save the change, but your changes won't be synced with Dynamics 365, and will be overwritten if the same field value is changed in Dynamics 365. So if fields are synced one way, there's no need to change the value in the synchronized field.

## View the synchronized fields

1. In the web app, in the upper-right corner of the screen, click the **Settings** button > **Options**.
2. In the **Set Personal Options** dialog box, choose the **Synchronization** tab.
3. Choose **synchronized fields**.
4. In the **Synchronization Settings for Outlook or Exchange** dialog box, click the **Synchronization Fields** tab.

5. In the **Entity Type** list, select the record type you want to view.

   Outlook fields are displayed on the left and the corresponding Dynamics 365 fields are displayed on the right. The blue arrows show the sync direction:

| This indicator | Shows that the fields |
| --- | --- |
|  | Are synced one way from Outlook to Dynamics 365 |
|  | Are synced one way from Dynamics 365 to Outlook |
|  | Are synced two way |
|  | Aren't synced |

> **NOTE**
> Field synchronization direction can be impacted by security settings configured by your system administrator. For example, if you don't have read privileges for a field, it won't be synchronized in Outlook even if the field is configured for two-way synchronization. To determine whether you have read privileges for a field, click the **View in Dynamics 365** button to open the record in Dynamics 365. If you see the **Lock** icon, you can't access the field.

## See also

Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook
What fields can be synchronized between Dynamics 365 and Outlook or Exchange?
Control field synchronization between Dynamics 365 and Outlook or Exchange (admins)
How security affects synchronization between Dynamics 365 and Outlook or Exchange

# Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

## What's the best way to use Outlook and Microsoft Dynamics 365 together?

There are three ways to use Microsoft Dynamics 365 and Outlook together:

- Dynamics 365 App for Outlook
- Dynamics 365 for Outlook
- Microsoft Exchange folder tracking

  Use Dynamics 365 App for Outlook paired with server-side synchronization to view Microsoft Dynamics 365 data in Outlook and track Outlook records in Microsoft Dynamics 365. You can use Dynamics 365 App for Outlook together with Microsoft Outlook on the web, the Outlook desktop application, or with Outlook mobile. With Dynamics 365 App for Outlook, Dynamics 365 information appears next to a user's Outlook email messages or appointments. For example, people can preview information about contacts and leads stored in Dynamics 365 and add Dynamics 365 contacts directly from an email message. They can also link email, appointment, and contact records to new or existing Dynamics 365 records, such as opportunity, account, or case records. To use Dynamics 365 App for Outlook, you must synchronize email with server-side synchronization. More information: Integrate your email system with Dynamics 365

> **IMPORTANT**
> As of 1/29/2018, based on overwhelming customer feedback and our desire to continue supporting our customers, we have **decided not to deprecate Dynamics 365 for Outlook** (Outlook add-in). Please read this blog post for more details.

## How often are records synchronized through server-side sync?

If you synchronize records with server-side synchronization, the process is dynamic and unique for each user's mailbox. The synchronization algorithm ensures that mailboxes are synced according to dynamic parameters such as the number of email messages and the activity within the mailbox. Normally, email synchronization occurs every 5 minutes. When a mailbox has many email messages, the interval can be reduced dynamically to 2 minutes. If the mailbox is less active, the interval can be increased up to 12 minutes. Generally speaking, you can assume that a mailbox will be synced at least once every 12 minutes.

However, when you use Dynamics 365 App for Outlook to track or set the regarding record for an email or appointment, synchronization happens immediately in most scenarios for received emails and sent appointments. If the immediate synchronization in Dynamics 365 App for Outlook fails, we leverage server-side synchronization to create or update the activity record in Dynamics 365.

## Where can I find information on troubleshooting server-side synchronization issues?

You can find information on troubleshooting and known issues here: Troubleshooting and things to know about server-side synchronization.

## Do security permissions affect synchronization?

Yes. If a system administrator has implemented security for particular fields or records, it can affect the data that's synchronized.

## Privacy notices

If you use Dynamics 365, when you use server-side sync, Dynamics 365 contacts and activities (including emails, appointments, contacts, and tasks) are synchronized to your specified email system (such as Exchange).

An administrator can configure server-side sync functionality to specify which users have the ability to send emails or appointments from Dynamics 365 or synchronize activities and contacts between Dynamics 365 and the user's mailbox. Both the administrator and end users can further customize filter criteria, and administrators can even define which entity fields synchronize.

If you use Dynamics 365 (online), when you use the Sync to Outlook feature, the Dynamics 365 data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in Dynamics 365 (online) to ensure that the information remains current between the two. Outlook Sync downloads only the relevant Dynamics 365 record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync Dynamics 365 data to Outlook by using security roles.

To use Microsoft Dynamics 365 for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, Dynamics 365 for Outlook will automatically connect to Microsoft Dynamics 365 (online) every time you open Outlook.

After the first time you sign in and use Dynamics 365 for Outlook, the connection between your computer and Dynamics 365 (online) will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and Dynamics 365 only by using a configuration setting, but if you do turn off the connection, Dynamics 365 for Outlook may exhibit decreased performance.

If you use Dynamics 365 for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, Dynamics 365 for Outlook will send Dynamics 365 (online) the sender's email address, the recipient's email address, and the subject line of the message. This allows Dynamics 365 (online) to validate whether or not a particular mail should be stored by the Dynamics 365 (online) service. When you track an item, a copy of that item will be maintained by the Dynamics 365 service and will be visible to other users in your organization who have the appropriate permissions. When you untrack an item, that copy is automatically deleted from Dynamics 365 (online) only if you own the item.

**See also**

Integrate your email system with Dynamics 365
Dynamics 365 App for Outlook User's Guide
Track Outlook email by moving it to a tracked Exchange folder
Set personal options that affect tracking and synchronization between Dynamics 365 and Outlook or Exchange

# Set personal options that affect tracking and synchronization between Dynamics 365 and Outlook or Exchange

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use the **Set Personal Options** dialog box in Dynamics 365 to set many options that affect tracking and synchronization.

To open the **Set Personal Options** dialog box:

- In Dynamics 365, click the **Settings** button in the upper-right corner of the screen, and then click **Options**.

  The following table summarizes the tracking and synchronization options available in the **Set Personal Options** dialog box. The **Available** column indicates whether the option is available in Dynamics 365. This column also indicates if the option is available for Outlook synchronization, server-side synchronization (also known as “Exchange synchronization”), or both. More information: Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook

| To | On this tab | In this section | See this option | Available |
|---|---|---|---|---|
| View or modify the online synchronization filters used to determine the Dynamics 365 records copied to your local hard drive | Synchronization | Synchronize Dynamics 365 items with Outlook or Exchange | View or manage the **filters** that determine the Dynamics 365 records that are synchronized to your Outlook or Exchange folders.<br><br>More information: Choose the records to synchronize between Dynamics 365 and Outlook or Exchange | - From Dynamics 365<br>- For Outlook sync or server-side sync |
| View or modify the offline synchronization filters used to determine the Dynamics 365 records copied to your local hard drive when you go offline | Synchronization | Manage your offline filters and take your information offline in Dynamics 365 for Outlook | Manage your **offline filters** to determine what Dynamics 365 data you need with you when you go offline. | - From Dynamics 365<br>- For Outlook sync or server-side sync |

| | | | | |
|---|---|---|---|---|
| View the fields that are synchronized between Outlook and Dynamics 365 | Synchronization | | View or manage the **synchronized fields** of Outlook or Exchange items, including appointments, contacts, and tasks. | - From Dynamics 365<br>- For Outlook sync or server-side sync |
| Overwrite the names in the Outlook contacts Company field with the parent account from Dynamics 365 contacts | Synchronization | Update the company field for Outlook contacts | Update Company fields with parent account names | - For Outlook sync or server-side sync |
| Set the synchronization client that synchronizes records between Outlook and Dynamics 365 | Synchronization | Set synchronization client | Set this computer to be the client to perform synchronization between Outlook and your primary Dynamics 365 organization | - For Outlook sync only. **Note:** This option only appears when you have multiple Outlook clients that are connected to the same organization. |
| Set the synchronization interval for synchronizing Dynamics 365 items | Synchronization | Schedule automatic synchronization with Outlook | Synchronize the Dynamics 365 items in my Outlook folders every | - For Outlook sync only |
| Enable Dynamics 365 to send email using Dynamics 365 for Outlook | Email | Select how Microsoft Dynamics 365 for Outlook should integrate email with Dynamics 365 | Allow Dynamics 365 to send email using Microsoft Dynamics 365 for Outlook | From Dynamics 365 for Outlook only |
| Track incoming email automatically | Email | Select how Microsoft Dynamics 365 for Outlook should integrate email with Microsoft Dynamics 365 | Check incoming email in Outlook and determine whether an email should be linked and saved as a Dynamics 365 record. | From Dynamics 365 for Outlook only |
| Track incoming email automatically | Email | Select the email messages to track in Dynamics 365 | Track | From Dynamics 365 |
| Track incoming email automatically | Email | Select the email messages to track in Dynamics 365 | Configure Folder Tracking Rules<br><br>More information: [Track Outlook email by moving it to a tracked Exchange folder] | - From Dynamics 365<br>- For server-side sync only |

| | | | | |
|---|---|---|---|---|
| Automatically create contact or lead records if the sender of the email message or meeting invitation doesn't already have a record in Dynamics 365 | Email | Automatically create records in Dynamics 365 | Create | From Dynamics 365 |
| Select how email recipients are matched to Dynamics 365 records | Address Book | Select how email recipients are reconciled with Dynamics 365 records | All options | From Dynamics 365 for Outlook only |
| Set the synchronization interval for updating your local data when you go offline | Local Data | Set how often to update local data | Update local data every<br><br>Note: You may not be able to change the interval if your administrator has restricted changes. | From Dynamics 365 for Outlook only |
| Select how duplicate records should be handled when going from offline to online | Local Data | Select how duplicate records should be handled during synchronization | Enable duplicate detection during offline to online synchronization | From Dynamics 365 for Outlook only |

# Privacy notices

To use Microsoft Dynamics 365 for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, Dynamics 365 for Outlook will automatically connect to Microsoft Dynamics 365 (online) every time you open Outlook.

After the first time you sign in and use Dynamics 365 for Outlook, the connection between your computer and Dynamics 365 (online) will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and Dynamics 365 only by using a configuration setting, but if you do turn off the connection, Dynamics 365 for Outlook may exhibit decreased performance.

If you use Dynamics 365 for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, Dynamics 365 for Outlook will send Dynamics 365 (online) the sender's email address, the recipient's email address, and the subject line of the message. This allows Dynamics 365 (online) to validate whether or not a particular mail should be stored by the Dynamics 365 (online) service. When you track an item, a copy of that item will be maintained by the Dynamics 365 service and will be visible to other users in your organization who have the appropriate permissions. When you untrack an item, that copy is automatically deleted from Dynamics 365 (online) only if you own the item.

If you use Dynamics 365 (online), when you use the Sync to Outlook feature, the Dynamics 365 data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in Dynamics 365 (online) to ensure that the information remains current between the two. Outlook Sync downloads only the relevant Dynamics 365 record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization’s users are permitted to sync Dynamics 365 data to Outlook by using security roles.

**See also**

Track Outlook email by moving it to a tracked Exchange folder
Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Microsoft Outlook

# Monitor email processing errors

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Dynamics 365 generates alerts if errors occur while email is being processed. An error can be classified based on the nature of the error and on whether the error is for an email, a mailbox, or an email server profile.

The following table lists the distinction between permanent and transient errors.

| PERMANENT ERRORS | TRANSIENT ERRORS |
| --- | --- |
| These are of permanent nature and can occur when the transient errors aren't fixed after a few attempts. | These are of temporary nature and may get fixed automatically after a few attempts. |
| When these errors occur, email processing for the affected mailboxes is stopped. These require a corrective action by the mailbox owner or a Dynamics 365 administrator. | These errors don't necessarily require a corrective action by a Dynamics 365 user, but we recommend that you look at these. |
| The administrators and users are alerted on their alert walls to take action and start email processing. | The administrators and users are notified on the alerts wall about these errors but no action is required for these errors. |

The following table will help you distinguish between email-level, mailbox-level, and email server profile-level errors and whether a corrective action is needed.

| EMAIL-LEVEL ERRORS | MAILBOX-LEVEL ERRORS | EMAIL SERVER PROFILE-LEVEL ERRORS |
| --- | --- | --- |
| These are errors specific to an email message. | These are error specific to a mailbox. | These errors may occur for one or more mailboxes. |
| These don't have impact on the processing of other email. | The owner of the mailbox is notified on the alerts wall and the owner is required to take a corrective action. | The owner of the associated email server profile is notified on the alerts wall and the owner is required to take a corrective action. |
| The alerts for these are displayed in the alerts section of the email form. | The alert is also displayed in the respective mailbox form. | The owners of the mailbox that are affected are also notified on the alerts wall but no action is required by them. |

## View alerts

The alerts are shown on the Alerts wall or the Alerts section in the mailbox or email server profile records. The following table shows how to view the alerts and the actions you can take on these alerts.

| TO | DO THIS |
| --- | --- |

| TO | DO THIS |
|---|---|
| View all alerts | Go to **Sales** > **Alerts**.<br><br>- To delete all alerts at once, click or tap the Delete all alerts icon on the alerts wall.<br>- To view just errors, warnings, or information, click or tap **Errors**, **Warnings**, or **Information** respectively.<br><br>If you are also synchronizing appointments, contacts, and tasks through server-side synchronization, you'll see alerts for the following:<br><br>- When one or more duplicate records are found in Dynamics 365 when saving a record from Exchange to Dynamics 365.<br>- When a scheduling conflict is found when saving an appointment from Exchange to Dynamics 365 because a mailbox is unavailable at the time.<br>- When previously linked items are found for a specific mailbox.<br><br>You'll be prompted to take actions on the errors about the appointment, contacts, and tasks synchronization. |
| View alerts specific to mailbox | 1. Go to **Settings** > **Email Configuration**.<br>2. Click **Mailboxes**.<br>3. Open a mailbox record, and on the left navigation bar, under **Common**, click or tap **Alerts**. |
| View alerts specific to an email server profile | 1. Go to **Settings** > **Email Configuration**.<br>2. Click **Email Server Profiles**.<br>3. Open an email server profile record, and on the left navigation bar, under **Common**, click or tap **Alerts**. |

> **NOTE**
> If you don't wish to get alerts, you can disable them from the System Settings dialog box – Email tab by clearing the check boxes for alerts.

## See also

# Why does the email message I sent have a "Pending Send" status?

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If you create an email message in Dynamics 365 and click the **Send** button, the message will not be sent unless email integration has been correctly configured and enabled for sending email from Dynamics 365. If the status of the email appears as "Pending Send" and is not sent, contact your Dynamics 365 administrator. More information: Find your Dynamics 365 administrator or support person

If you are the Dynamics 365 administrator, verify that the user who sent the email is enabled for sending email. To do this:

1. Click **Settings**, and then click **Email Configuration**.
2. Click **Mailboxes**, and then change the view to **Active Mailboxes.**
3. Select the Dynamics 365 mailbox record for the user who sent the email, and then click the **Edit** button.
4. Verify the user is correctly configured and enabled for sending email:
    - If the user's Dynamics 365 mailbox record is configured to use server-side synchronization for outgoing email, verify the user's email address is approved and is also tested and enabled. For more information about configuring server-side synchronization, see set up server-side synchronization of email, appointments, contacts, and tasks.

**See also**

Integrate your email system with Microsoft Dynamics 365

# Use Email message filtering and correlation to specify which emails are tracked

10/16/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Server-side synchronization, Microsoft Dynamics 365 for Outlook, or the Email Router can automatically create email activities in Dynamics 365, which are based on received email messages. This type of automation is known as email message tracking. Users can select a filtering option that determines what email messages will be tracked in Dynamics 365. Filtering is set on the **Email** tab of the **Set Personal Options** dialog box in the Dynamics 365 client applications. Users can set the following options:

- **All email messages**. All email messages received by the user are tracked (will have activities created).
- **Email messages in response to Dynamics 365 email**. Only replies to email messages that have already been tracked will be saved as email activities. This option uses smart matching, a correlation method that uses the existing properties contained in the email to relate email messages to activities.
- **Email messages from Dynamics 365 Leads, Contacts, and Accounts**. Only email messages sent from leads, contacts, and accounts in the Dynamics 365 database are saved as activities.
- **Email messages from Microsoft Dynamics 365 records that are email enabled**. Email messages are tracked from any record type that contains an email address, including customized record types (entities).

By default, the **Email messages in response to Dynamics 365 email** option is enabled. Correlation occurs after an email message is filtered. System administrators can turn off all message tracking for a particular user by setting **Incoming Email** under **Synchronization Method** to **None** on the Mailbox form.

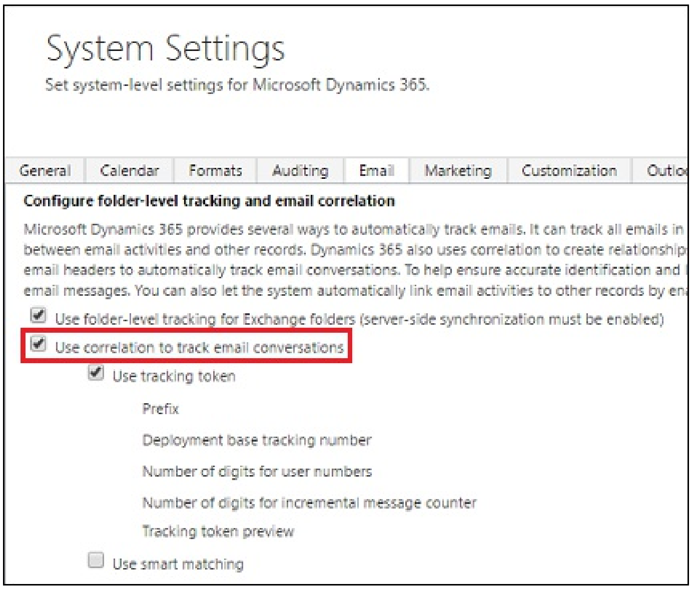
Email correlation is set on the **Email** tab of the System Settings page and can be enabled or disabled for the entire Dynamics 365 organization. Dynamics 365 uses two kinds of correlation, tracking tokens and smart matching. By default, both correlation types are enabled.

> **IMPORTANT**
> Tracking tokens are the only supported correlation method that can be used when you use Dynamics 365 for Outlook connected to an SMTP server and send email to a non-Exchange recipient. In this situation, if tracking tokens are not enabled, then correlation events, such as the automatically creating records based on the regarding object, may not work.

## How Dynamics 365 uses conversations to track emails

Use Exchange conversations to increase the probability for email identification and matching. Exchange groups together related email and assigns them an id (conversation id), to identify emails that are part of one conversation.

1. Go to **Settings** > **Administration** > **System Settings**.
2. Click the **Email** tab.
3. In the **Configure folder-level tracking and email correlation** area, click **Use correlation to track email conversations**.




If checked, this option uses the conversation id to identify all the emails that replied to a tracked email.

## How Dynamics 365 associates email addresses with records

When Dynamics 365 tracks an email, it associates the email address to a record within Dynamics 365. The contents of the email **From** field can only be associated with one Dynamics 365 record. If there are duplicate records within Dynamics 365 with the same email address, the contents of the email **From** field will resolve to the first active record in the following order:

1. SystemUser
2. Contact
3. Account
4. Lead
5. Equipment
6. Team
7. Business unit
8. Email-enabled entities (for example: Queues, custom, etc.)

In the email **To** field, all of the Dynamics 365 records of email-enabled entities with the email address will be listed.

## How Dynamics 365 uses tracking tokens

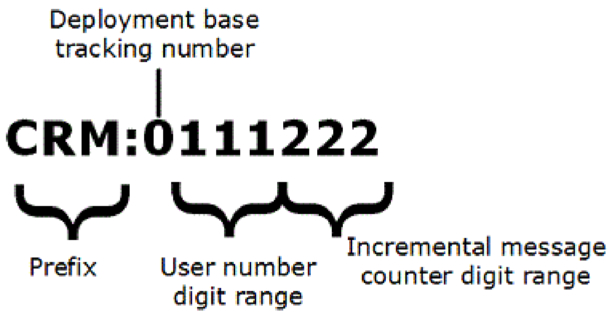
Tracking tokens increase the probability for email identification and matching. You can use the tracking token feature to improve email message tracking. A tracking token is an alphanumeric string generated by Dynamics 365 and appended to the end of an email subject line. It matches email activities with email messages.

Tracking tokens add an additional correlation component to smart matching. When Dynamics 365 generates an outgoing email activity, a resulting email response arriving in the Dynamics 365 system is then correlated to the originating activity.

By default, the tracking token feature is turned on.

**Tracking token structure**

By default, Dynamics 365 uses the following token structure, that consists of a 4 character prefix and a 7 digit identifier.




The following table lists tracking token parts and descriptions.

| PART | DESCRIPTION |
|---|---|
| Prefix | Configurable from 1-20 characters. The default value is *Dynamics 365:*. The prefix can be unique for each organization or Dynamics 365 (online) instance. For example, in a multi-tenant deployment of Dynamics 365, we recommend that each organization configure and use a unique prefix. |
| Deployment base tracking number | Configurable from 0-2,147,483,647. Default value is 0. Can be used as an identifier for a specific instance, organization, or deployment of Dynamics 365. |
| User number digit range | Configurable from 1-9. The default range is three (3) digits. This value determines how many digits to use when Dynamics 365 generates the numeric identifier for the Dynamics 365 user who generated the email activity. |
| Incremental message counter digit range | Configurable from 1-9. Default range is three (3) digits. This value determines how many digits to use when Dynamics 365 generates the numeric identifier for the email activity (not the individual messages that the activity contains). If you use the default value to generate a token with a three-digit number, it will increment the number through 999, and then restart the number at 000. You can use a larger order of digits to reduce the possibility of assigning duplicate tokens to active email threads. |

Although we don’t recommend it because it can significantly reduce the probability for accurate email activity to email message correlation, you can turn tacking tokens off. To enable, disable, or configure tracking tokens, do the following:

1. Go to **Settings** > **Administration** > **System Settings**.

2. Click the **Email** tab.

3. In the **Configure email correlation** area you can disable, enable, or change the default tracking token structure.

## What is smart matching?

When an incoming email message is processed by the Email Router, the system extracts information associated with the email message subject, sender address, and recipients’ addresses that link the email activity to other Dynamics 365 records. This correlation process, also known as smart matching, uses the following criteria to match received email message information to email activities:

- **Subject matching**. Prefixes, such as RE: or Re:, and letter case are ignored. For example, email message subjects with *Re: hello* and *Hello* would be considered a match.

- **Sender and recipient matching**. The system calculates the number of exact sender and recipient email addresses in common.

When the matching process is complete, the system selects the owner and the object of the incoming email message.

By default, smart matching is turned on.

> **NOTE**
>
> You can disable, enable, and tune smart-matching settings in the System Settings dialog box – Email tab.

**See also**

Forward mailbox vs. individual mailboxes

# Forward mailbox vs. individual mailboxes

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can use mailbox monitoring to poll one or more mailboxes for incoming email messages, and then determine what actions Dynamics 365 will take based on the email message, such as create or update records in the system. You can configure server-side synchronization or the Email Router to monitor either of the following:

- A forward mailbox. This is a single, central mailbox.
- The mailbox for each user or queue.

If you administer an organization that has to monitor a large number of mailboxes, you should consider using a forward mailbox to reduce the administrative effort. Monitoring many mailboxes can sometimes require maintaining access credentials in many incoming configuration profiles.

By using a forward mailbox, you shift the administrative effort to the task of deploying a server-side forwarding rule to each user mailbox. The forwarding rule forwards all incoming email messages as attachments to the centralized forward mailbox. For Microsoft Exchange Server only, you can use the Rule Deployment Wizard (installed with the Microsoft Dynamics CRM Email Router) to deploy forwarding rules. This can significantly reduce administration and maintenance requirements because the Rule Deployment Wizard can deploy forwarding rules to multiple Dynamics 365 users at the same time.

**IMPORTANT**

- To use a forward mailbox with a Dynamics 365 deployment that interfaces with a POP3-compliant email system, the email system must be able to forward email messages as attachments.
- For POP3 e-mail servers and Exchange Online, you cannot use the Rule Deployment Wizard. Instead, you must create the rules manually.

You can configure users and queues in different ways within the same Dynamics 365 deployment. For example, you may want to configure some user or queue mailboxes to be monitored directly on one email server, and configure others to use a forward mailbox on a different email server.

## Monitor a forward mailbox

When you use forward mailbox monitoring, incoming email messages are processed by Microsoft Exchange Server or the POP3 server and Dynamics 365 in the following sequence:

1. An email message is received by a Dynamics 365 user or queue mailbox, on either the Exchange Server or the POP3 server.
2. A rule in the user's mailbox sends a copy of the message, as an attachment, to the forward mailbox.
3. Dynamics 365 (by using server-side synchronization or Email Router) retrieves the message from the forward mailbox and creates the appropriate records.

**See also**

# Recover from Exchange Server failure

9/19/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The process to restore a Microsoft Exchange Server computer that is used by Dynamics 365 depends on how that instance of Exchange Server is being used. The only time Dynamics 365-related data exists on Exchange Server occurs when you use a forward mailbox with the Microsoft Dynamics CRM Email Router or server-side synchronization. Dynamics 365 doesn't directly use Exchange Server mailboxes.

> **NOTE**
> This topic applies to Email Router which has been deprecated and was removed in version 9.0 of Dynamics 365. We strongly recommend that you migrate all email routing functionality to use the server-side synchronization feature.

## Restore Exchange Server in a Dynamics 365 environment

1. Restore Exchange Server.
2. If the Email Router was installed on the computer that is running Exchange Server (not recommended), reinstall the Email Router.
3. Restore the Microsoft.Crm.Tools.EmailAgent.xml file. By default, this file is located in the C:\Program Files\Microsoft Dynamics 365 Email\Service folder on the computer where the Email Router is installed. If this file isn't available, you must reconfigure the profiles, settings, users, queue, and forward-mailbox information by running the Email Router Configuration Manager.

For more information about Exchange Server 2016 backup and recovery, see Backup, restore, and disaster recovery.

For more information about Exchange Server 2013 backup and recovery, see Backup, restore, and disaster recovery.

For more information about Exchange Server 2010 backup and recovery, see Understanding Backup, Restore and Disaster Recovery.

**See also**

# Extend with integration and solutions

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Extend Dynamics 365 with a rich set of interoperability and connectivity features.

**See also**

# Manage your documents using SharePoint

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

With Dynamics 365, you can set up folders to save and manage your documents, specify permissions for managing tasks, and ensure that the SharePoint site URLs are correct.

# SharePoint Document Management software requirements

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If you want to use SharePoint document management functionality with Dynamics 365 (online) , you must meet the requirements listed in this topic.

## Use document management in Dynamics 365 (online)

If you are using server-based integration with SharePoint, you can use SharePoint Online or SharePoint 2013 SP1 on-premises (or a later version).

If you are using the Microsoft Dynamics CRM 2016 List Component for Microsoft SharePoint, one of the following versions of SharePoint must be available:

- SharePoint 2013 or SharePoint 2013 SP1
- SharePoint 2010 SP1 or SP2
- SharePoint Online

**A SharePoint site collection**. You also need to have at least one site collection configured and available for Dynamics 365.

Either **Server-based SharePoint integration** (recommended) or **Microsoft Dynamics CRM List Component** must be enabled.

The list component, which is a SharePoint solution, is not required if you use server-based SharePoint integration. Although the Microsoft Dynamics CRM List Component is the default document management configuration option, we recommend you enable server-based SharePoint integration. More information: Server-based SharePoint integration

> **IMPORTANT**
>
> The document management feature requires that Dynamics 365 (online) and SharePoint Online subscriptions be under the same tenant.
>
> SharePoint Foundation versions aren't compatible with Dynamics 365 document management.

Users who access SharePoint from Dynamics 365 must have appropriate permissions on the SharePoint site collection where the document management components are installed. For more information about how to grant membership on a site collection, see the SharePoint Help.

## Server-based SharePoint integration

Earlier versions of Dynamics 365 document management use a client-to-server strategy to authenticate and transmit data from Dynamics 365 to SharePoint. Server-based (using server-to-server authentication) SharePoint integration provides the following benefits:

- User interface that is consistent with the newly-updated Dynamics 365 user interface.
- To configure and use document management, you do not need to be signed in to both Dynamics 365 and SharePoint.
- You no longer need to install or continue to use the Microsoft Dynamics CRM List Component solution. Note that client-to-server authentication strategies that require SharePoint Online server sandboxing may be deprecated soon. This functionality is required by the Microsoft Dynamics CRM List Component.

**SharePoint authentication method support**

| SHAREPOINT VERSION | LIST COMPONENT SUPPORT | SERVER-BASED SHAREPOINT INTEGRATION SUPPORT |
|---|---|---|
| SharePoint 2013 or SharePoint 2013 SP1 | Yes | Yes with SharePoint 2013 SP1 when used with Dynamics 365 (online) |
| SharePoint 2010 SP1 or SP2 | Yes | No |
| SharePoint Online | Yes | Yes |

**NOTE**

You can create and view folders when using the Microsoft Dynamics CRM List Component. This is not available in server-based SharePoint integration.

For information about how to enable server-based SharePoint integration, see Set up SharePoint integration with Dynamics 365.

For more information about the Microsoft Dynamics CRM List Component, see Dynamics CRM List Component for SharePoint.

## Dynamics CRM List Component for SharePoint

The Microsoft Dynamics CRM List Component makes Dynamics 365 documents that are stored on SharePoint available to you in a format that has the look and feel of Dynamics 365. This feature also lets Dynamics 365 automatically create folders that will be used to store documents related to Dynamics 365 records on SharePoint.

The Microsoft Dynamics CRM List Component has the following benefits:

- Users can create and view folders when using document management within Dynamics 365.
- Users can create custom content types such as a Sales Contract content type.

**IMPORTANT**

- Notice that the Microsoft Dynamics CRM List Component isn't required when you use server-based integration with SharePoint. More information: Server-based SharePoint integration
- Cient-to-server authentication strategies that require SharePoint server sandboxing, like those used with the Microsoft Dynamics CRM List Component, may be deprecated soon.
- There are two versions of the Microsoft Dynamics CRM List Component:
  - **Microsoft Dynamics CRM 2016 List Component for Microsoft SharePoint Server 2010** . This version doesn't work with SharePoint 2013.
  - **Microsoft Dynamics CRM 2016 List Component for Microsoft SharePoint Server 2013** . This version doesn't work with SharePoint 2010.

### See also

Download: Microsoft Dynamics CRM 2016 List Component for Microsoft SharePoint Server 2013 or Microsoft SharePoint Server 2010

Set up and manage tablets and phones

# Important considerations for server-based SharePoint integration

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Before you move to server-based SharePoint integration, review the following table to see some of the differences you'll experience between client-based versus server-based SharePoint integration.

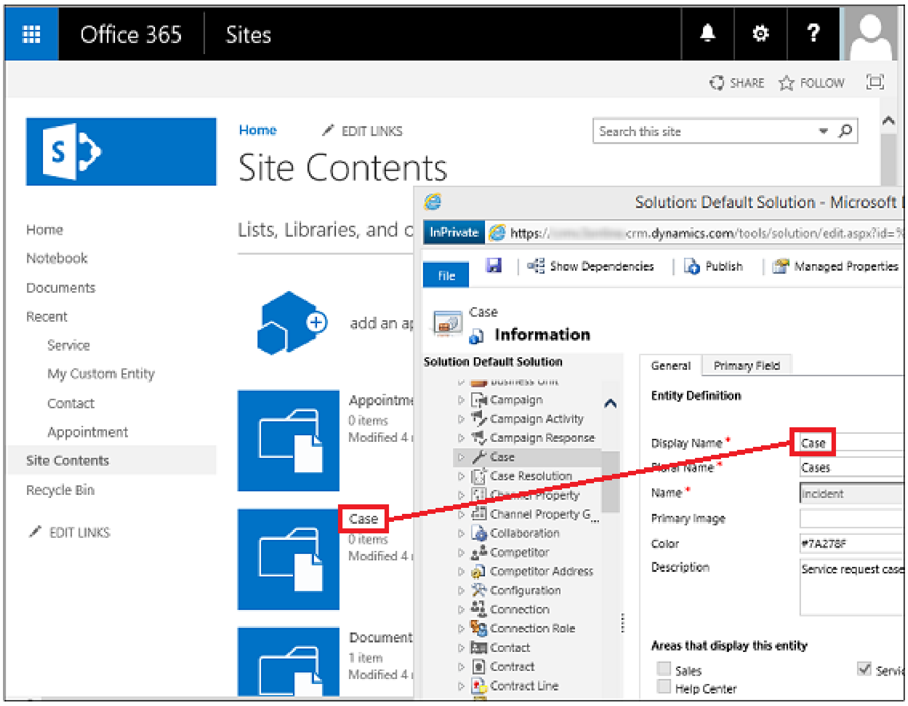
| AREA | CLIENT-BASED SHAREPOINT INTEGRATION | SERVER-BASED SHAREPOINT INTEGRATION | FOR THOSE MOVING TO SERVER-BASED SHAREPOINTINTEGRATION |
|---|---|---|---|
| **Sign in** | Must sign in to both Dynamics 365 and SharePoint to be able to view the document grid. | Only need to sign in to Dynamics 365. | |
| **List component** | Must download list component and upload directly to SharePoint site before connecting site to Dynamics 365. | No list component required. | |
| **Support lifecycle** | This approach relies on the sandboxed solutions functionality on SharePoint. SharePoint plans to deprecate this functionality. If the sandboxed functionality isn't available for a SharePoint site, this integration won't work. | This approach relies on server-to-server authentication and won't be affected by the deprecation of the sandboxed solutions functionality in SharePoint. | More information: Deprecation of Custom Code in Sandboxed Solutions |
| **SharePoint commands** | Includes:<br><br>- Alert Me<br>- Download a Copy<br>- Copy Shortcut<br>- Send Shortcut<br>- View Properties<br>- Version History | Does not include the SharePoint commands listed in the client-based integration column. | The client-based actions can be accessed directly in SharePoint with server-based integration. Select **Open SharePoint** to view the document location directly in SharePoint and access the actions.<br><br>`![Open SharePoint Team Site](../admin/media/crm-o365-to-go-external components.png "Open SharePoint Team Site")` |

| AREA | CLIENT-BASED SHAREPOINT INTEGRATION | SERVER-BASED SHAREPOINT INTEGRATION | FOR THOSE MOVING TO SERVER-BASED SHAREPOINTINTEGRATION |
|---|---|---|---|
| **Custom content types** | Can create new custom content types. | Can't create new custom content types. | Previously created custom content types can still be viewed and edited but to create a new custom content type you'll need to create it directly in SharePoint using **Open SharePoint**. |
| **Absolute URLs** | Supported | Unsupported | Users moving from the client-based approach to the server-based approach need to convert their absolute URLs to relative URLs. This will only work if the absolute URL provided is in a SharePoint site valid for server-based SharePoint integration. |
| **Folder navigation** | Users can create SharePoint folders while in Dynamics 365. Folders are displayed in a grid that users can navigate through. | Users can't create folders in Dynamics 365 and the folders aren't displayed in Dynamics 365. | All documents under subfolders are displayed in the Dynamics 365 grid. Relative URLs are displayed to show users where the document is located relative to the parent folder. SharePoint document views can be customized so users see only documents in a specific folder or subfolder.<br><br>More information: "Validation Error" when you try to configure server-based SharePoint integration for Dynamics CRM Online and SharePoint Online |
| **Online support** | Can connect:<br><br>- Dynamics 365 (online) with SharePoint Online<br>- Dynamics 365 (online) with SharePoint Server (on-premises) | Can connect:<br><br>- Dynamics 365 (online) with SharePoint Online if the SharePoint site is under the same Office 365 tenant as Dynamics 365 (online).<br>- Dynamics 365 (online) with SharePoint on-premises. | |

| AREA | CLIENT-BASED SHAREPOINT INTEGRATION | SERVER-BASED SHAREPOINT INTEGRATION | FOR THOSE MOVING TO SERVER-BASED SHAREPOINTINTEGRATION |
|---|---|---|---|
| **Resource Throttling** | Doesn't apply. | A document library with 5000 or more documents might experience resource throttling. More information: Resource throttles and limits | If you have more than 5000 documents in your document library, you can view the documents in the default grid view. However, if you sort on columns other than the default sorted column, you might see an error indicating that the throttling limit has been exceeded. |

## Known issues with server-based SharePoint integration

The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in Dynamics 365. 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 Dynamics 365.




These names should match.

More information: Error message when using the new server-based SharePoint integration for Dynamics CRM Online and SharePoint Online: "List Does Not Support This Operation"

### See also

Install the list component
Permissions required for document management tasks

# Set up SharePoint integration

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

With Dynamics 365, you can use the document management capabilities of SharePoint from within Dynamics 365. You can store and manage documents in the context of a Dynamics 365 record on a SharePoint Server, and leverage the SharePoint infrastructure to share, manage, and collaborate efficiently. Because the documents are stored on a SharePoint Server, non-Dynamics 365 users can directly access the documents on the SharePoint Server, provided they have the appropriate permissions.

For document management functionality, you either enable server-based SharePoint integration (recommended) or install the Microsoft Dynamics CRM List Component, a SharePoint solution, on a site collection in SharePoint. Server-based SharePoint integration is recommended instead of the Microsoft Dynamics CRM List Component for the following reasons.

- Users sign-in once and do not have to sign-in to both Dynamics 365 and SharePoint. With the list component, users must sign in to both.
- The list component is a SharePoint sandboxed solution. Sandboxed solutions are being deprecated and will no longer be available for both SharePoint Online and later versions of SharePoint on-premises. More information: Sandboxed solutions overview
- No additional software is required to install on SharePoint.
- SharePoint documents will display in Dynamics 365 lists.
- Users can perform SharePoint actions from the Dynamics 365 command bar.

**See also**

Manage your documents
Permissions required for document management tasks
Validate and fix SharePoint site URLs
Enable SharePoint document management for specific entities

# Set up Dynamics 365 (online) to use SharePoint Online

9/20/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

When you use SharePoint Online with Dynamics 365 (online), you can:

- Create, upload, view, and delete documents stored in SharePoint from within Dynamics 365.
- Use the SharePoint document management abilities within Dynamics 365, such as checking the document in and out and changing document properties.
- Enable non-Dynamics 365 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: Configure SharePoint integration using the list component.

> **TIP**
> Check out the following video: Connect Dynamics 365 to SharePoint Online

To set up Dynamics 365 (online) to use SharePoint Online, complete the following steps.

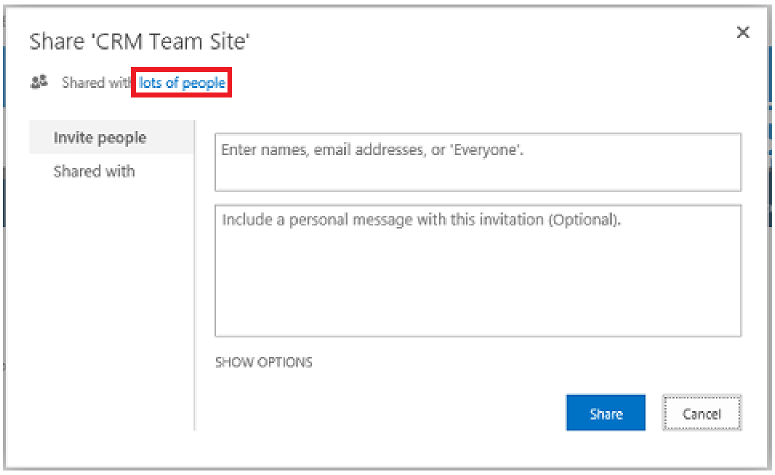
## Assign user permissions to the Team SharePoint site

Your Dynamics 365 (online) and 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 credentials.
2. Open the Office 365 app launcher, and then click **SharePoint**.
3. c. On the left-side menu, click **Team Site**.
4. On the Home page, click **SHARE** (upper-right corner).


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




6. By default, all users in your 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 Dynamics 365 (online) for SharePoint document management

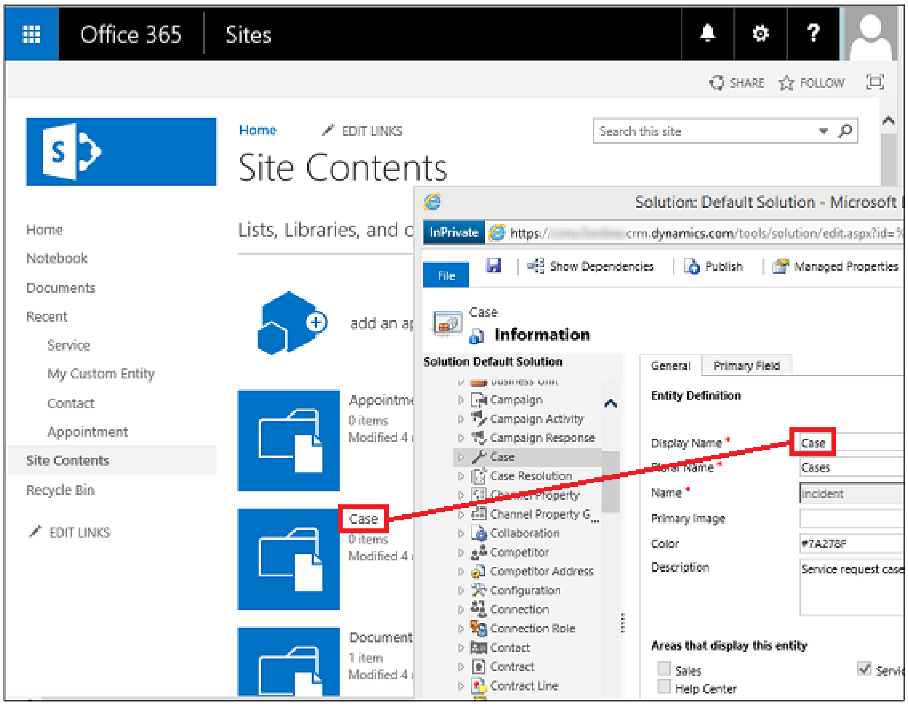
For Dynamics 365 (online) organizations, Dynamics CRM Online Spring '14 introduced a new server-based (using server-to-server authentication) SharePoint integration that removes the need to install or continue to use the Microsoft Dynamics CRM List Component solution.

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**

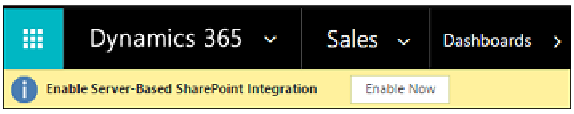
The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in Dynamics 365. Server-based SharePoint integration uses the entity display name. When you upgrade to server-based SharePoint integration, be sure to check that the display names in your document library on SharePoint match the entity display names in Dynamics 365. 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

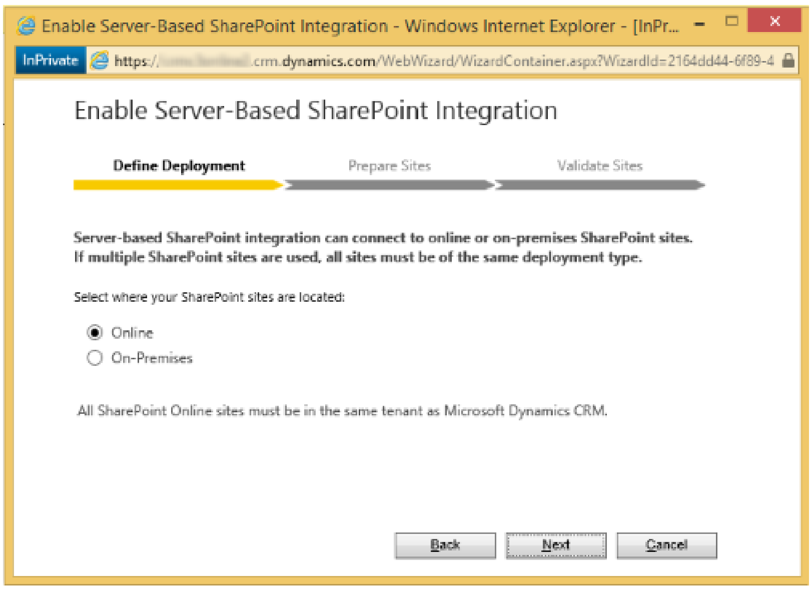
If your Dynamics 365 organization has not deployed document management, when a Dynamics 365 System Administrator logs in an alert message will be displayed to enable server-based SharePoint integration.




> **NOTE**
>
> If you don't see the alert and have not previously enabled server-based SharePoint integration, clear your browser cache or open Dynamics 365 using Internet Explorer with InPrivate browsing to have the alert display again. Once you configure server-based integration, the alert will no longer appear.

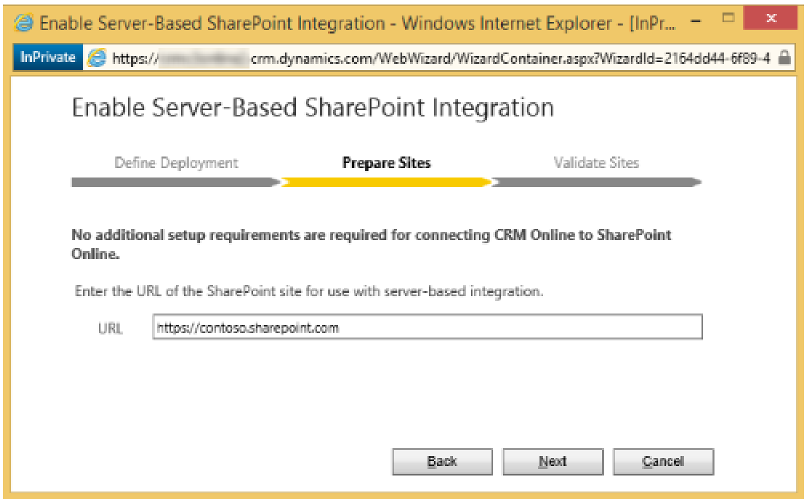
1. In the Enable Server-based SharePoint Integration alert click **Next**.

2. Choose **Online** for where your SharePoint sites are located, and then choose **Next**.



3. If your Dynamics 365 (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, click **Admin centers** > **SharePoint**, and then click **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 Dynamics 365 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: Enable document management on entities

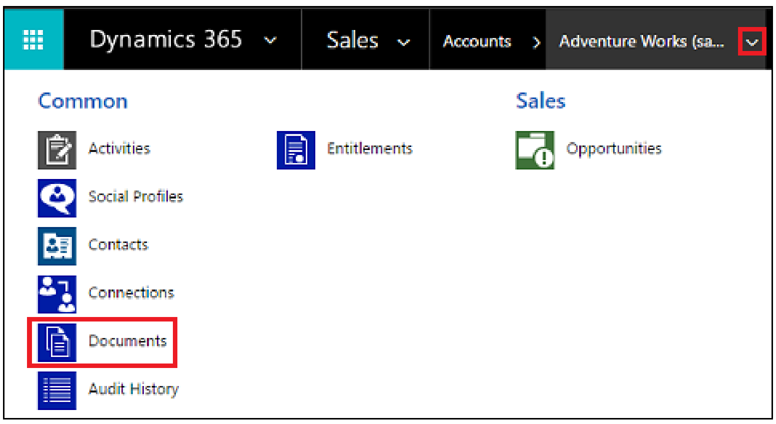
# Using Document Management

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).

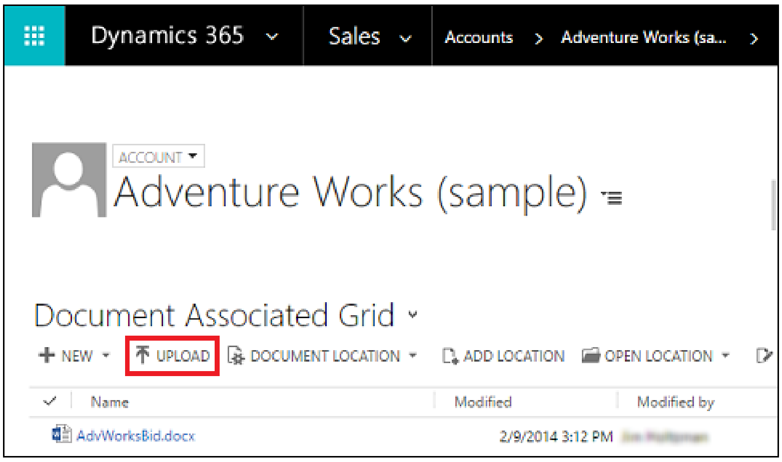
1. Browse to your Dynamics 365 (online) web application.

2. Choose an account, such as the **Adventure Works** sample account.

3. On the nav bar, click the down arrow next to the account name, and then click **Documents**.

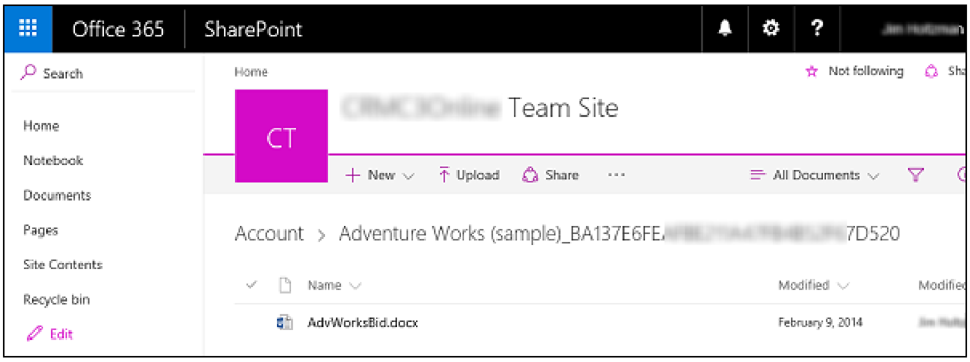


4. Click **Upload**, and then browse to a document to upload to the new folder in your Office 365SharePoint Online Team site.



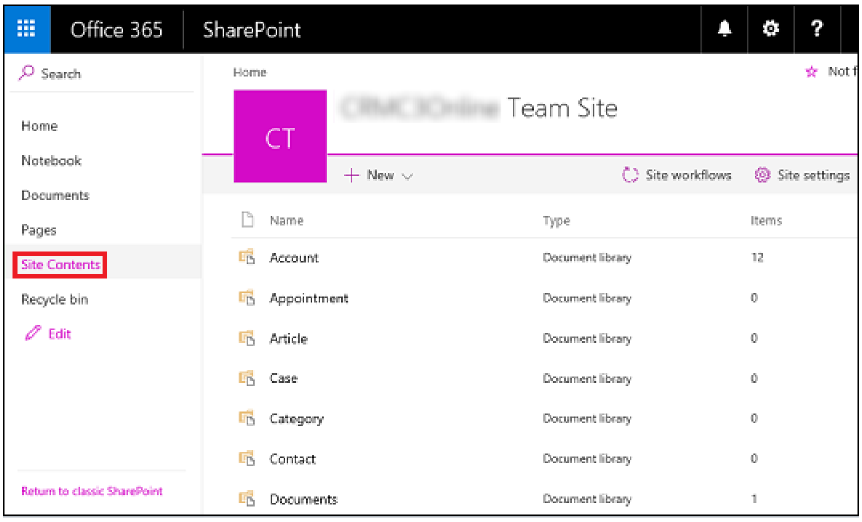

5. Select a Dynamics 365 folder location, and then click **Ok**.

6. To see the document in your Office 365SharePoint Online Team site, click to the left of the document name (you'll see a check mark), and then click **Open Location**.




7. Click **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).




### See also

[Manage your documents using SharePoint](#)
[SharePoint Online for IT pros](#)

# Switching from the list component or changing the deployment

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Follow the steps described here to switch from the list component to server-based authentication or if you change the SharePoint deployment type, such as moving from SharePoint on-premises to SharePoint Online.

## Switch from list component to server-based authentication

If your organization is already using the list component with SharePoint for document management with Dynamics 365, you can switch to server-based authentication by following these steps.

1. Follow the steps to set up server-based SharePoint integration that best fits your deployment type. For more information, see the See Also topics below.

   > **NOTE**
   >
   > If you've made changes to SharePoint, such as new SharePoint servers, new site collections, or migrated from SharePoint on-premises to SharePoint Online, consider deactivating outdated SharePoint site records. When you run the Enable Server-Based SharePoint Integration wizard, the wizard will attempt to validate all active SharePoint sites. More information: Deactivate a site

2. Although it is not required for server-based authentication, we recommend that you deactivate and then delete the list component SharePoint solution from the SharePoint site collection. To do this, after you have confirmed that server-based authentication is enabled, in a web browser sign-in to the site collection, click the **Settings** button in the top-right corner, then **Site Settings**, and then under **Web Designer Galleries**, click **Solutions**. Choose **crmlistcomponent**, and then on the tool bar click **Deactivate**. Choose the **crmlistcomponent** again, and then on the tool bar click **Delete**.

## Changing the SharePoint deployment type

1. After the migration of SharePoint to either online or on-premises is completed, deactivate the outdated SharePoint site records. You must do this because, when you run the Enable Server-Based SharePoint Integration wizard, the wizard will attempt to validate all active SharePoint sites. More information: Deactivate a site

2. Follow the steps to set up server-based SharePoint integration that best fits your deployment type. For more information, see the See Also topics below.

## Deactivate a site

1. Go to **Settings** > **Document Management**.
2. Click **SharePoint Sites**.
3. Select the SharePoint site you want to remove, and then on the tool bar select **Deactivate**.
4. Repeat step three for all sites that you want to deactivate.

**See also**

Configure server-based authentication with Dynamics 365 (online) and SharePoint Online
Configure server-based authentication with Dynamics 365 Online and SharePoint on-premises
Set up SharePoint integration with Microsoft Dynamics 365

# Configure server-based authentication with Dynamics 365 (online) and SharePoint Online

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Office 365 Global administrators can enable document management functionality by using server-based SharePoint integration. Server-based SharePoint integration allows Dynamics 365 (online) and SharePoint Online to perform a server-to-server connection. Server-based SharePoint integration requires no additional software.

> **IMPORTANT**
> Once you enable server-based SharePoint integration, you won't be able to revert to the previous client-based authentication method. Therefore, you can't use the Microsoft Dynamics CRM List Component after you have configured your Dynamics 365 organization for server-based SharePoint integration.
>
> Before you implement server-based SharePoint integration, see Important considerations for server-based SharePoint integration.

To enable server-based SharePoint integration with Dynamics 365 (online) and SharePoint Online, follow these steps.

1. Go to **Settings** > **Document Management**.
2. Click **Enable server-based SharePoint integration**.
3. The Enable server-based SharePoint integration page appears. Click **Next**.
4. Under **Select where your SharePoint sites are located** make sure **Online** is selected, and then click **Next**.
5. Enter the URL for the SharePoint site. The URL should appear similar to https://contoso.sharepoint.com. Click **Next**.

   > **TIP**
   > To see your SharePoint site collections, in the Office 365 Admin Center, choose **Admin centers** > **SharePoint**, and then choose site collections.

6. The site is validated. Click **Enable** > **Finish**.

   If the site cannot be validated, see Troubleshooting server-based authentication.

   After you complete the **Enable server-based SharePoint integration** wizard, add or remove the entities that will be used for document management with SharePoint.

7. Go to **Settings** > **Document Management**.
8. Then go to **Document Management Settings**. More information: Enable document management on entities

**TIP**

- For an overview and step-by-step configuration details, check out this video YouTube: Connect CRM Online to SharePoint Online.
- Once you enable server-based SharePoint integration with Dynamics 365 (online) and SharePoint Online, you can then enable OneNote integration. More information: Set up OneNote integration

## Information transmitted between Dynamics 365 (online) and SharePoint when you use server-based SharePoint integration

When you use the document management feature in Dynamics 365 by using server-based SharePoint integration, the following information is transmitted between Dynamics 365 (online) and SharePoint:

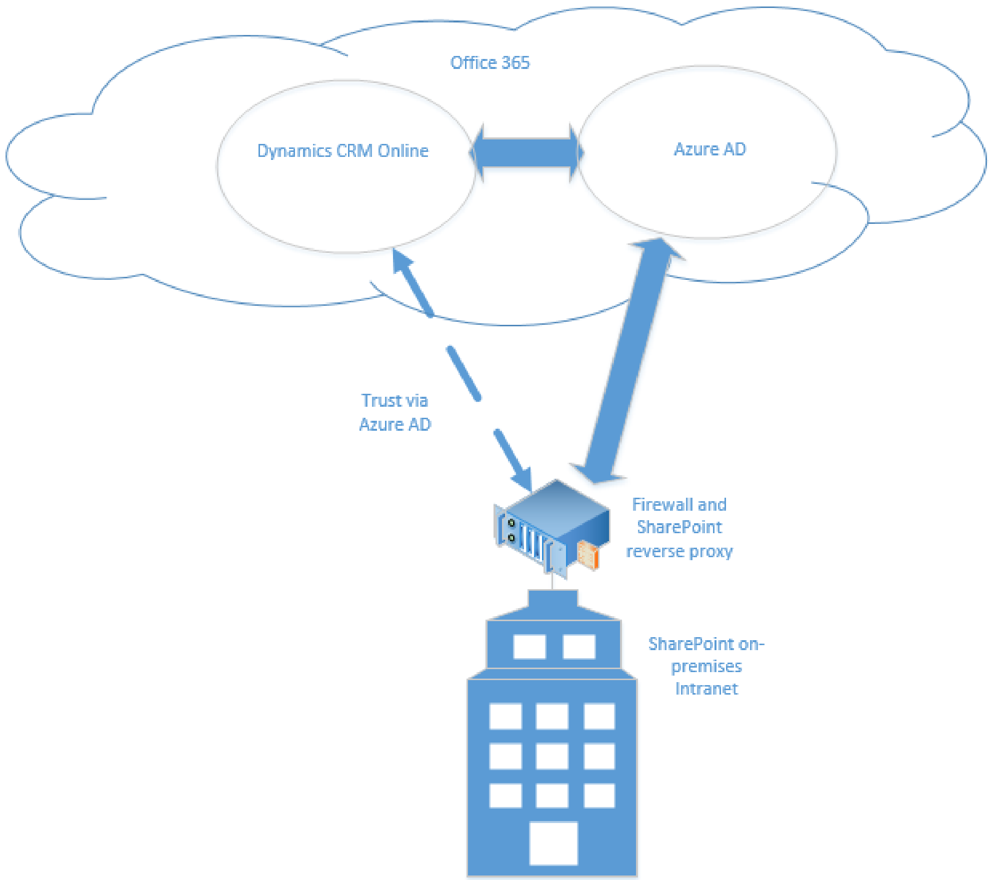
- Entity name for the entity that is used to create folders in SharePoint, such as Account, Article, or Lead. To configure the entities that are integrated, go to **Settings** > **Document Management** > **Document Management Settings**.

# Configure server-based authentication with Dynamics 365 (online) and SharePoint on-premises

8/24/2018 • 10 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Introduced with Dynamics CRM Online 2015 Update 1, server-based SharePoint integration for document management can be used to connect Dynamics 365 (online) with SharePoint on-premises. When using server-based authentication, Azure AD Domain Services is used as the trust broker and users do not need to sign in to SharePoint.




## Permissions required

Office 365

- Office 365 Global Administrators membership - this is required for administrative-level access to the Office 365 subscription and to run the AzurePowerShell cmdlets.

Dynamics 365 (online)

- **Run SharePoint Integration Wizard** privilege. This is required to run the Enable Server-based Authentication wizard in Dynamics 365.

  By default, the System Administrator security role has this permission.

  SharePoint on-premises

- Farm Administrators group membership - this is required to run most of the PowerShell commands on the SharePoint server.

## Set up server-to-server authentication with Dynamics 365 (online) and SharePoint on-premises

Follow the steps in the order provided to set up Dynamics 365 (online) with SharePoint 2013 on-premises.

> **IMPORTANT**
>
> - The steps described here must be completed in the order provided. If a task is not completed, such as a PowerShell command that returns an error message, the issue must be resolved before you continue to the next command, task, or step.
> - Once you enable server-based SharePoint integration, you won't be able to revert to the previous client-based authentication method. Therefore, you can't use the Microsoft Dynamics CRM List Component after you have configured your Dynamics 365 organization for server-based SharePoint integration.

### Verify prerequisites

Before you configure Dynamics 365 (online) and SharePoint on-premises for server-based authentication, the following prerequisites must be met:

#### SharePoint prerequisites

- SharePoint 2013 (on-premises) with Service Pack 1 (SP1) or later version

  > **IMPORTANT**
  >
  > SharePoint Foundation 2013 versions aren't supported for use with Dynamics 365 document management.

- Hotfix KB2883081 for SharePoint Foundation 2013 August 12, 2014 (Sts-x-none.msp)

  > **IMPORTANT**
  >
  > The following updates are prerequisites to KB2883081 and may also be required.
  >
  > - http://support2.microsoft.com/kb/2768000
  > - http://support.microsoft.com/kb/2767999
  > - http://support.microsoft.com/kb/2880963

- SharePoint configuration
  - If you use SharePoint 2013, for each SharePoint farm, only one Dynamics 365 can be configured for server-based integration.
  - SharePoint website must be accessible via the Internet. A reverse proxy may also be required for SharePoint authentication. More information: Configure a reverse proxy device for SharePoint Server 2013 hybrid
  - SharePoint website must be configured to use SSL (HTTPS) and the certificate must be issued by a public root Certificate Authority. More information: SharePoint: About Secure Channel SSL certificates
  - A reliable user property to use for claims-based authentication mapping between SharePoint and Dynamics 365. More information: Selecting a claims mapping type
  - For document sharing, the SharePoint search service must be enabled. More information: Create and

configure a Search service application in SharePoint Server

- For document management functionality when using the Dynamics 365 mobile apps, the on-premises SharePoint server must be available through the Internet.

**Other prerequisites**

- SharePoint Online license. Dynamics 365 (online) to SharePoint on-premises server-based authentication must have the SharePoint service principal name (SPN) registered in Azure Active Directory. To achieve this, at least one SharePoint Online user license is required. The SharePoint Online license can derive from a single user license and typically comes from one of the following:
  - A SharePoint Online subscription. Any SharePoint Online plan is sufficient even if the license isn't assigned to a user.
  - An Office 365 subscription that includes SharePoint Online. For example, if you have Office 365 E3, you have the appropriate licensing even if the license isn't assigned to a user.

    For more information about these plans, see Office 365: Select a plan and Compare SharePoint options

- The following software features are required to run the PowerShell cmdlets described in this topic.
  - Microsoft Online Services Sign-In Assistant for IT Professionals Beta
  - MSOnlineExt
  - To install the MSOnlineExt module, enter the following command from an administrator PowerShell session. `PS> Install-Module -Name "MSOnlineExt"`

  > **IMPORTANT**
  > At the time of this writing, there is an issue with the RTW version of Microsoft Online Services Sign-In Assistant for IT Professionals. Until the issue is resolved, we recommend that you use the Beta version. More information: Microsoft Azure Forums: Cannot install Azure Active Directory Module for Windows PowerShell. MOSSIA is not installed.

- A suitable claims-based authentication mapping type to use for mapping identities between Dynamics 365 (online) and SharePoint on-premises. By default, email address is used. More information: Grant Microsoft Dynamics 365 permission to access SharePoint and configure the claims-based authentication mapping

### Update the SharePoint Server SPN in Azure Active Directory Domain Services

On the SharePoint on-premises server, in the SharePoint 2013 Management Shell, run these PowerShell commands in the order given.

1. Prepare the PowerShell session.

   The following cmdlets enable the computer to receive remote commands and add Office 365 modules to the PowerShell session. For more information about these cmdlets see Windows PowerShell Core Cmdlets.

   ```
   Enable-PSRemoting -force
   New-PSSession
   Import-Module MSOnline -force
   Import-Module MSOnlineExtended -force
   ```

2. Connect to Office 365.

   When you run the Connect-MsolService command, you must provide a valid Microsoft account that has Office 365 Global Administrator membership for the SharePoint Online license that is required.

For detailed information about each of the Azure Active DirectoryPowerShell commands listed here, see [Manage Azure AD using Windows PowerShell]

```
$msolcred = get-credential
connect-msolservice -credential $msolcred
```

3. Set the SharePoint host name.

   The value that you set for the variable *HostName* must be the complete host name of the SharePoint site collection. The hostname must be derived from the site collection URL and is case sensitive. In this example, the site collection URL is *https://SharePoint.constoso.com/sites/salesteam*, so the hostname is *SharePoint.contoso.com*.

```
$HostName = "SharePoint.contoso.com"
```

4. Get the Office 365 object (tenant) id and SharePoint Server Service Principal Name (SPN).

```
$SPOAppId = "00000003-0000-0ff1-ce00-000000000000"
$SPOContextId = (Get-MsolCompanyInformation).ObjectID
$SharePoint = Get-MsolServicePrincipal -AppPrincipalId $SPOAppId
$ServicePrincipalName = $SharePoint.ServicePrincipalNames
```

5. Set the SharePoint Server Service Principal Name (SPN) in Azure Active Directory.

```
$ServicePrincipalName.Add("$SPOAppId/$HostName")
Set-MsolServicePrincipal -AppPrincipalId $SPOAppId -ServicePrincipalNames $ServicePrincipalName
```

   After these commands complete do not close the SharePoint 2013 Management Shell, and continue to the next step.

**Update the SharePoint realm to match that of SharePoint Online**

On the SharePoint on-premises server, in the SharePoint 2013 Management Shell, run this Windows PowerShell command.

The following command requires SharePoint farm administrator membership and sets the authentication realm of the SharePoint on-premises farm.

Caution

Running this command changes the authentication realm of the SharePoint on-premises farm. For applications that use an existing security token service (STS), this may cause unexpected behavior with other applications that use access tokens. More information: Set-SPAuthenticationRealm.

```
Set-SPAuthenticationRealm -Realm $SPOContextId
```

**Create a trusted security token issuer for Azure Active Directory on SharePoint**

On the SharePoint on-premises server, in the SharePoint 2013 Management Shell, run these PowerShell commands in the order given.

The following commands require SharePoint farm administrator membership.

For detailed information about these PowerShell commands, see Use Windows PowerShell cmdlets to administer security in SharePoint 2013.

1. Enable the PowerShell session to make changes to the security token service for the SharePoint farm.

```
$c = Get-SPSecurityTokenServiceConfig
$c.AllowMetadataOverHttp = $true
$c.AllowOAuthOverHttp= $true
$c.Update()
```

2. Set the metadata endpoint.

```
$metadataEndpoint = "https://accounts.accesscontrol.windows.net/" + $SPOContextId + "/metadata/json/1"
$acsissuer = "00000001-0000-0000-c000-000000000000@" + $SPOContextId
$issuer = "00000007-0000-0000-c000-000000000000@" + $SPOContextId
```

3. Create the new token control service application proxy in Azure Active Directory.

```
New-SPAzureAccessControlServiceApplicationProxy -Name "Internal" -MetadataServiceEndpointUri
$metadataEndpoint -DefaultProxyGroup
```

**NOTE**

The `New- SPAzureAccessControlServiceApplicationProxy` command may return an error message indicating that an application proxy with the same name already exists. If the named application proxy already exists, you can ignore the error.

4. Create the new token control service issuer in SharePoint on-premises for Azure Active Directory.

```
$ = New-SPTrustedSecurityTokenIssuer –Name "ACSInternal" –IsTrustBroker:$true –MetadataEndpoint
$metadataEndpoint -RegisteredIssuerName $acsissuer
```

**Grant Dynamics 365 permission to access SharePoint and configure the claims-based authentication mapping**

On the SharePoint on-premises server, in the SharePoint 2013 Management Shell, run these PowerShell commands in the order given.

The following commands require SharePoint site collection administration membership.

1. Register Dynamics 365 with the SharePoint site collection.

   Enter the SharePoint on-premises site collection URL. In this example, *https://sharepoint.contoso.com/sites/crm/* is used.

**IMPORTANT**

To complete this command, the SharePoint App Management Service Application Proxy must exist and be running. For more information about how to start and configure the service, see the Configure the Subscription Settings and App Management service applications subtopic in Configure an environment for apps for SharePoint (SharePoint 2013).

```
$site = Get-SPSite "https://sharepoint.contoso.com/sites/crm/"
Register-SPAppPrincipal -site $site.RootWeb -NameIdentifier $issuer -DisplayName "crm"
```

2. Grant Dynamics 365 application access to the SharePoint site. Replace *https://sharepoint.contoso.com/sites/crm/* with your SharePoint site URL.

> **NOTE**
>
> In the following example, the Dynamics 365 application is granted permission to the specified SharePoint site collection by using the –Scope site collection parameter. The Scope parameter accepts the following options. Choose the scope that is most appropriate for your SharePoint configuration.
>
> - `site`. Grants the Dynamics 365 application permission to the specified SharePoint website only. It doesn't grant permission to any subsites under the named site.
>   - `sitecollection`. Grants the Dynamics 365 application permission to all websites and subsites within the specified SharePoint site collection.
>   - `sitesubscription`. Grants the Dynamics 365 application permission to all websites in the SharePoint farm, including all site collections, websites, and subsites.

```
$app = Get-SPAppPrincipal -NameIdentifier $issuer -Site "https://sharepoint.contoso.com/sites/crm/"
Set-SPAppPrincipalPermission -AppPrincipal $app -Site $site.Rootweb -Scope "sitecollection" -Right
"FullControl"
```

3. Set the claims-based authentication mapping type.

> **IMPORTANT**
>
> By default, the claims-based authentication mapping will use the user's Microsoft account email address and the user's SharePoint on-premises **work email** address for mapping. When you use this, the user's email addresses must match between the two systems. For more information, see Selecting a claims-based authentication mapping type.

```
$map1 = New-SPClaimTypeMapping -IncomingClaimType
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress" -IncomingClaimTypeDisplayName
"EmailAddress" -SameAsIncoming
```

#### Run the Enable server-based SharePoint integration wizard

In the Dynamics 365 app, follow these steps:

1. Go to **Settings** > **Document Management**.
2. In the **Document Management** area, click **Enable server-based SharePoint integration**.
3. Review the information and then click **Next**.
4. For the SharePoint sites, click **On-premises**, and then **Next**.
5. Enter the SharePoint on-premises site collection URL, such as *https://sharepoint.contoso.com/sites/crm*. The site must be configured for SSL.
6. Click **Next**.
7. The validate sites section appears. If all sites are determined valid, click **Enable**. If one or more sites are

determined invalid, see Troubleshooting server-based authentication.

### Select the entities that you want to include in document management

By default, Account, Article, Lead, Product, Quote, and Sales Literature entities are included. You can add or remove the entities that will be used for document management with SharePoint in **Document Management Settings** in Dynamics 365. Go to **Settings** > **Document Management**.More information: Enable document management on entities

## Add OneDrive for Business integration

After you complete Dynamics 365 and SharePoint on-premises server-based authentication configuration, you can also integrate OneDrive for Business. With Dynamics 365 and OneDrive for Business integration, Dynamics 365 users can create and manage private documents using OneDrive for Business. Those documents can be accessed in Dynamics 365 once the system administrator has enabled OneDrive for Business.

### Enable OneDrive for Business

On the Windows Server where SharePoint Server on-premises is running, open the SharePoint Management Shell and run the following commands:

```
Add-Pssnapin *
# Access WellKnown App principal
[Microsoft.SharePoint.Administration.SPWebService]::ContentService.WellKnownAppPrincipals

# Create WellKnown App principal
$ClientId = "00000007-0000-0000-c000-000000000000"
$PermissionXml = "<AppPermissionRequests AllowAppOnlyPolicy=""true""><AppPermissionRequest
Scope=""http://sharepoint/content/tenant"" Right=""FullControl"" /><AppPermissionRequest
Scope=""http://sharepoint/social/tenant"" Right=""Read"" /><AppPermissionRequest
Scope=""http://sharepoint/search"" Right=""QueryAsUserIgnoreAppPrincipal"" /></AppPermissionRequests>"

$wellKnownApp= New-Object -TypeName "Microsoft.SharePoint.Administration.SPWellKnownAppPrincipal" -
ArgumentList ($ClientId, $PermissionXml)

$wellKnownApp.Update()
```

## Selecting a claims-based authentication mapping type

By default, the claims-based authentication mapping will use the user's Microsoft account email address and the user's SharePoint on-premises work email address for mapping. Note that whatever claims-based authentication type you use, the values, such as email addresses, **must match** between Dynamics 365 (online) and SharePoint. Office 365 directory synchronization can help with this. More information: Deploy Office 365 Directory Synchronization (DirSync) in Microsoft Azure. To use a different type of claims-based authentication mapping, see Define custom claim mapping for SharePoint server-based integration.

> **IMPORTANT**
>
> To enable the Work email property, SharePoint on-premises must have a User Profile Service Application configured and started. To enable a User Profile Service Application in SharePoint, see Create, edit, or delete User Profile service applications in SharePoint Server 2013. To make changes to a user property, such as Work email, see Edit a user profile property. For more information about the User Profile Service Application, see Overview of the User Profile service application in SharePoint Server 2013.

### See also

Troubleshooting server-based authentication
Set up SharePoint integration with Microsoft Dynamics 365

# Troubleshooting server-based authentication

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

## Troubleshooting the Enable server-based SharePoint Integration wizard

Review the error log for information about why the site doesn't validate. To do this, click **Error Log** in the Enable Server-Based SharePoint Integration wizard after the validate sites stage is completed.

The enable server-based SharePoint integration validation check can return one of the following four types of failures.

#### Failed Connection

This failure indicates that the SharePoint server could not be accessed from where the validation check was run. Verify that the SharePoint URL that you entered is correct and that you can access the SharePoint site and site collection by using a web browser from the computer where the Enable Server-Based SharePoint Integration wizard is running. More information: Troubleshooting hybrid environments (SharePoint)

#### Failed Authentication

This failure can occur when one or more of the server-based authentication configuration steps were not completed or did not complete successfully. More information: Set up SharePoint integration with Dynamics 365

This failure can also occur if an incorrect URL is entered in the Enable Server-Based SharePoint Integration wizard or if there is a problem with the digital certificate used for server authentication.

#### Failed Authorization

This failure can occur when the claims-based authentication types do not match. For example, in a hybrid deployment such as Dynamics 365 (online) to SharePoint on-premises, when you use the default claims-based authentication mapping, the Microsoft account email address used by the Dynamics 365 (online) user must match the SharePoint user's **Work email**. More information: Selecting a claims mapping type

#### SharePoint Version Not Supported

This failure indicates that the SharePoint edition, version, required service pack, or required hotfix are missing.

## Troubleshooting SharePoint

Issues that affect server-based authentication can also be recorded in SharePoint logs and reports. For more information about how to view and troubleshoot SharePoint monitoring, see the following topics. View reports and logs in SharePoint 2013 and Configure diagnostic logging in SharePoint 2013

## Known issues with server-based authentication

This section describes the known issues that may occur when you set up or use Dynamics 365 and SharePoint server-based authentication.

#### Failed authentication is returned when validating a SharePoint site even though you have appropriate permission

Applies to: Dynamics 365 (online) with SharePoint Online, Dynamics 365 (online) with SharePoint on-premises

This issue can occur when the claims-based authentication mapping that is used provides a situation where the claims type values don't match between Dynamics 365 and SharePoint. For example, this issue can occur when the following items are true:

- You use the default claims-based authentication mapping type, which for Dynamics 365 (online) to SharePoint Online server-based authentication uses the Microsoft account unique identifier.
- The identities used for Office 365, Dynamics 365 (online) administrator, or SharePoint Online administrator don't use the same Microsoft account, therefore the Microsoft account unique identifiers don't match.

**"Private key not found" error message returned when you run the CertificateReconfiguration.ps1 Windows PowerShell script**

Applies to: Dynamics 365 (online) with SharePoint on-premises

This issue can occur when there are two self-signed certificates located in the local certificate store that have the same subject name.

Notice that this issue should only occur when you use a self-signed certificate. Self-signed certificates should not be used in production environments.

To resolve this issue, remove the certificates with the same subject name that you don't need using the Certificate Manager MMC snap-in and note the following.

> **IMPORTANT**
>
> It can take up to 24 hours before the SharePoint cache will begin using the new certificate. To use the certificate now, follow the steps here to replace the certificate information in Dynamics 365.
>
> To resolve this issue by following the steps in this article, the existing certificate cannot be expired.

**Replace a certificate that has the same subject name**

1. Use an existing or create a new and self-signed certificate. The subject name must be unique to any certificate subject names that are registered in the local certificate store.
2. Run the following PowerShell script against the existing certificate, or the certificate that you created in the previous step. This script will add a new certificate in Dynamics 365, which will then be replaced in a later step.

```
CertificateReconfiguration.ps1 -certificateFile <Private certificate file (.pfx)> -password <private-certificate-password> -updateCrm -certificateType AlternativeS2STokenIssuer -serviceAccount <serviceAccount> -storeFindType FindBySubjectDistinguishedName
```

3. Remove the AlternativeS2STokenIssuer type certificate from the Dynamics 365 configuration database. To do this, run these PowerShell commands.

```
Add-PSSnapin Microsoft.Crm.PowerShell
$Certificates = Get-CrmCertificate;
$alternativecertificate = "";
foreach($cert in $Certificates)
{    if($cert.CertificateType -eq "AlternativeS2STokenIssuer") { $alternativecertificate = $cert;}

Remove-CrmCertificate -Certificate $alternativecertificate
```

**You receive "The remote server returned an error: (400) Bad Request" and "Register-SPAppPrincipal: The requested service, 'http://wgwitsp:32843/46fbdd1305a643379b47d761334f6134/AppMng.svc' could not be activated" error messages**

Applies to: SharePoint on-premises versions used with Dynamics 365.

The remote server returned an error: (400) Bad Request error message can occur after the certificate installation, such as when you run the CertificateReconfiguration.Ps1 script.

The Register-SPAppPrincipal: The requested service, 'http://wgwitsp:32843/46fbdd1305a643379b47d761334f6134/AppMng.svc' could not be activated error message can occur when you grant Dynamics 365 permission to access SharePoint by running the Register-SPAppPrincipal command.

To resolve both of these errors after they occur, restart the web server where the Dynamics 365 web application is installed. More information: Start or Stop the Web Server (IIS 8)

**“Something went wrong while interaction with SharePoint” error message received**

Applies to: All Dynamics 365 versions when used with SharePoint Online

This error can be returned to the user who doesn’t have site permissions or the user has had permissions removed from the SharePoint site where Dynamics 365 document management is enabled. Currently, this is a known issue with SharePoint Online where the error message that is displayed to the user doesn’t indicate that the user’s permissions are not sufficient to access the site.

**See also**

Permissions required for document management tasks

# Configure SharePoint integration using the list component

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If you can't use server-based SharePoint integration, you must install the Microsoft Dynamics CRM List Component to get document management functionality. The Microsoft Dynamics CRM List Component is a SharePoint solution that you upload and activate on a SharePoint site collection. This feature uses a client-to-SharePoint Server strategy to authenticate and transmit data.

> **WARNING**
> SharePoint Online has removed code-based sandbox solutions. Notice that the Microsoft Dynamics CRM List Component is a sandboxed solution that requires a SharePoint sandbox environment.
>
> - If you're integrating Dynamics 365 with SharePoint for the first time, use server-based authentication. More information: Set up SharePoint integration with Microsoft Dynamics 365
> - If you currently use the list component, we strongly recommend that you switch to server-based authentication. More information: Switching from the list component or changing the deployment

1. Make sure that you meet the requirements to use the Dynamics 365 documentation management feature with SharePoint. For more information, see SharePoint Document Management software requirements for Microsoft Dynamics 365.

2. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.

   - Don't have the correct permissions? Contact your system administrator.

3. Install the Microsoft Dynamics CRM List Component on the SharePoint server.

   > **IMPORTANT**
   > The Microsoft Dynamics CRM List Component is not required when you use server-based SharePoint integration. For more information, see Set up SharePoint integration with Microsoft Dynamics 365 .

   Go to **Settings** > **Document Management**. On the command bar, click **Install List Component** and follow the instructions here.

   a. Locate the folder where you downloaded `CRM2016-SharePointList2013-ENU-amd64.exe` or `CRM2016-SharePointList2010-ENU-amd64.exe`, and open it.

   b. Select **Click here** to accept the license agreement.

   c. Select a folder to store the extracted files, and then click **OK**.

d. If you downloaded CRM2016-SharePointList2013-ENU-amd64.exe, the AllowHtcExtn.ps1 and crmlistcomponent.wsp files are extracted.

   If you downloaded CRM2016-SharePointList2010-ENU-amd64.exe, the crmlistcomponent.wsp file is extracted.

e. Open your browser, and then in the address bar, type the URL of the site collection where you want to install the Microsoft Dynamics CRM List Component, and press **Enter**.

f. Locate **Solution Gallery** in SharePoint:

   - If you're using SharePoint 2010: Click **Site Actions**, then **Site Settings**, and then under **Galleries**, click **Solutions**.

   - If you're using SharePoint 2013 or SharePoint Online: Click the **Settings** button in the top-right corner, then **Site Settings**, and then under **Web Designer Galleries**, click **Solutions**.

   > **NOTE**
   >
   > If you don't see the **Solutions** link, check the custom script setting. In the Office 365 Admin Center, click **Admin** > **Settings**. Under **Custom Script**, click **Allow users to run custom script on self-service created sites**. Click **OK**. Changes may take up to 24 hours to take effect.

g. On the **Solutions** tab, in the **New** group, click **Upload Solution**.

h. Click **Browse**, locate the crmlistcomponent.wsp file, click **Open**, and then click **OK**.

i. After the solution is added, click **Activate** and then click **Close**.

   > **NOTE**
   >
   > If you can't activate this solution, see Allow HTC files in SharePoint 2013.

4. For detailed document management configuration steps, see Set up Dynamics 365 (online) to use SharePoint Online.

## Allow HTC files in SharePoint 2013

By default, HTML component (.htc) files aren't enabled on SharePoint 2013. To enable HTC, follow these steps.

1. Open PowerShell and navigate to the location where you downloaded and extracted the Microsoft Dynamics CRM List Component to.

2. Type the following command, where *https://mysharepointserver/Dynamics365* is the URL where the list component solution is installed, and then press **ENTER**.

```
./AllowHtcExtn.ps1 https://mysharepointserver/CRM
```

### See also

Download: Microsoft Dynamics CRM 2016 List Component for Microsoft SharePoint
Set up SharePoint integration with Microsoft Dynamics 365
Permissions required for document management tasks

# Enable SharePoint document management for specific entities

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Store the documents related to Dynamics 365 entity records in SharePoint and quickly access, share, and manage these documents from Dynamics 365 by enabling document management on the specific entities.

> **TIP**
> If you haven't set up server-based SharePoint integration, you may want to do that before enabling document management for specific entities. For more information, see Set up SharePoint integration with Microsoft Dynamics 365.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365. Or verify that you have Read and Write privileges on all record types that are customizable.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Document Management**.
3. Click **Document Management Settings**.
4. Select the entities that you want to use to manage SharePoint documents.

   If a URL is not already specified, enter the URL of the SharePoint site where the document locations and folders for storing documents will be created, and then click **Next**.

5. If you use server-based integration (recommended)

   - Check **Based on entity** to have document libraries and folders that are based on the Dynamics 365 Account entity automatically created on the SharePoint site. Users will not be prompted to create them.

     If you don't want folders automatically created, clear the **Based on entity** check box.

     When you first visit the documents grid, if you want users to confirm folder creation corresponding to the entity record on SharePoint, clear the **Automatically create folder** check box.

> **IMPORTANT**
>
> If you have Dynamics 365 (online) and SharePoint Online, make sure the site is under the same Office 365 tenant as your Dynamics 365 instances.
>
> The **Folders will be automatically created on the SharePoint site** option was first introduced in Dynamics CRM Online 2016 Update 1 and Dynamics CRM 2016 Service Pack 1 On-Premises.
>
> With the exception of the opportunity and contract entities, a hierarchical folder structure will not be automatically created in SharePoint for entities that have more than one many-to-one (N:1) relationship with the parent entity.

- Click **Finish**.

  For more information on server-based integration, see Set up SharePoint integration with Microsoft Dynamics 365.

If you don't use server-based integration

- If you want the document libraries and folders to be created, specify a valid SharePoint site URL, and make sure the SharePoint site has the Microsoft Dynamics CRM List Component for SharePoint Server installed. Note, this will also work if you specify a SharePoint Online site URL.

> **NOTE**
>
> The list component has been deprecated as of Dynamics CRM Online 2015 Update 1. For information on converting from the List Component, see Switching from the list component or changing the deployment.

- The remaining steps assume that the specified site is on SharePoint Server 2010 or SharePoint Server 2013 and the site collection for this site has the Microsoft Dynamics CRM List Component installed.

  By default, a folder for each record is created under the corresponding document library for the entity. For example, for an opportunity record “100 Bikes”, a document library “opportunity” is created, and in it, a folder “100 Bikes<entityGUID>” is created. The path is ../opportunity/100 Bikes<entityGUID>.

6. To have the folders created under the parent account or contact, select the **Based on entity** check box. In the list next to the check box, choose **Account** or **Contact**.

   When you select this option, the folders are created under the related account or contact folder.

   The structure is:.../account/Margie's Travel/opportunity/100 Bikes<entityGUID> where “account” is the document library for the referenced entity that you selected from the list, and “Margie's Travel” is the folder for the referenced record of the selected entity, which in this case it the `Opportunity` entity.

7. Click **Next**.

   Dynamics 365 creates document libraries for the selected entities on SharePoint. Dynamics 365 also creates the corresponding document location records that contain the links to these document libraries. The **Document Management Settings** wizard shows the creation status of the document libraries.

**See also**

Edit existing SharePoint site records
Set up SharePoint integration with Microsoft Dynamics 365

# Create or add a document location for the first time

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Before you can manage documents for a record from Dynamics 365, you must create a location record in Dynamics 365 that points to libraries and folders on SharePoint where the documents will be stored.

1. Open the Dynamics 365 record that has the documents you want to manage.

2. Under **Related**, click or tap**Documents**.

3. If a location isn't associated, Dynamics 365 displays the **Add Document Location** dialog box or **Create SharePoint Location** dialog box. The following table shows the possible scenarios. Depending upon what you see, perform the steps in the "Next steps" column.

| SCENARIO | WHAT APPEARS | NEXT STEPS |
| --- | --- | --- |
| There is at least one site record in Dynamics 365 that points to a site collection in SharePoint, and the site record has the **List component is installed** check box selected. | **Add Document Location** opens with an option to specify either an absolute URL or a relative URL. | 1. In the **Name** box, verify or type the name. The document location record is created in Dynamics 365 with this name.<br>2. In the **Document Location** box, enter the URL of the SharePoint folder to which the location record points. This location is associated with the Dynamics 365 record to store the documents.<br>- OR -<br>Click or tap**Create a new folder**. In the **Parent Site or Location** box, click or tap the **Lookup** button to select an existing document location record under which the folder will be created on SharePoint. In the **Folder Name** box, verify or change the name, and click or tap**OK**. A folder with this name is created in SharePoint.<br>3. Click or tap**Save**. |
| There is one site record in Dynamics 365 but the **List component is installed** check box is not selected. | **Add Document Location** appears with only the absolute URL option. | 1. In the **Name** box, verify or type a name. The document location record is created in Dynamics 365 with this name.<br>2. In the **Document Location** box, enter the URL of the SharePoint folder to which the location record points. This location record is associated with the Dynamics 365 record to store the documents.<br>3. Click or tap**Save**. |

| SCENARIO | WHAT APPEARS | NEXT STEPS |
|---|---|---|
| There is no existing location associated with the record, the URL specified in the **Document Management Settings** wizard is for a site collection on SharePoint Server 2010 or SharePoint Server 2013, and this site record has the **List component is installed** check box selected. | **Create SharePoint Location** appears. | Dynamics 365 tries to automatically create a folder in SharePoint. If the folder is created successfully, Dynamics 365 opens **Create SharePoint Location** with the URL of the new folder. Dynamics 365 creates a document location record that contains the URL of this new folder and associates the document location record with the Dynamics 365 record.<br><br>Click or tap**OK**. |

A new document location record is created in Dynamics 365 that contains the links to the folders in SharePoint. The location that you just associated is added to the **Document Locations** list.

### See also

Create or edit document location records

# Edit existing SharePoint site records

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Store documents related to your Dynamics 365 records in SharePoint folders and manage the folders and documents from within Dynamics 365. Integrating SharePoint document management with Dynamics 365 makes it easy to access and share documents associated with your Dynamics 365 records.

> **TIP**
> If you're using CRM 2013 SP1 or later, you can take advantage of server-based SharePoint integration between Dynamics 365 (online) and SharePoint Online. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of Dynamics 365.
>
> If you're using Dynamics 365 (online) or Microsoft Dynamics 365, you can use server-based SharePoint integration for on-premises and hybrid SharePoint deployments. For information about setting up server-based SharePoint integration using a wizard, see Set up SharePoint integration with Microsoft Dynamics 365

If you have already set up SharePoint document management, and want to edit your site records, use the following procedure.

## Edit site records

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Document Management**.
3. Click **SharePoint Sites**.
4. Select the site record you want to modify, and then click **Edit**.
5. Modify any of the following settings:

   - **Name**. Add or change the name for the site..
   - **Owner**. By default, the person who created the site is listed as the owner of the site record.
   - **Description**. Add or change the description for the site. For example, specify what documents the site contains.
   - **URL Type**. Specify whether you want to add an absolute (full) or relative URL for the site.
     - **Absolute URL**. To point this site record to a site collection or site in SharePoint, specify the fully qualified URL of the site collection or site. You can use this record as a parent site to create other site records with relative URLs for sites inside the site collection or sites on the same SharePoint site.

- **Relative URL**. Use this option when you have at least one site record pointing to a site collection in SharePoint. In the **Parent Site** box, select an existing Dynamics 365 site record. If the site record that you selected as a parent site points to a site collection on SharePoint, specify the name of an existing site in the second box. If the site record that you selected as a parent site points to a site on SharePoint, specify the name of an existing subordinate site on SharePoint.

- **List component is installed**. Select this check box if the URL that you specified is a site collection on SharePoint Server 2010 or SharePoint Server 2013 and if the site collection has the Dynamics 365 List component installed. This check box is available only if you use the **Absolute URL** option.

> **TIP**
> The List component has been deprecated in Dynamics 365. For information on switching from the List component to server-based integration, see Switching from the list component or changing the deployment

6. Click **Save**.

7. Click **Save and Close**.

> **NOTE**
> To activate or deactivate a site record, on the SharePoint Sites page, select the site record, and then in the **Records** group, click **Activate** or **Deactivate**.

**See also**

Set up SharePoint integration with Microsoft Dynamics 365
Switching from the list component or changing the deployment

# Create or edit document location records

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

SharePoint document locations are records in Dynamics 365 that point to a SharePoint document library or folder.

To store documents for Dynamics 365 records, the document libraries or folders must be in place. If Dynamics 365 is unable to create the document libraries and folders automatically, you can manually create these in SharePoint. After you create the document libraries and folders in SharePoint, you must create document location records in Dynamics 365 to point to these SharePoint document libraries and folders.

1. Go to **Settings** > **Document Management**.

2. Choose **SharePoint Document Locations**.

3. Choose **New**.

4. Specify the following information as required:

   - **Name**. Type a name for the document location. This name displays in the location list in the entity record.

   - **Owner**. By default, you are added as the owner of this location record.

   - **Description**. Type a description for the document location.

   - **URL Type**. Select whether you want to create the location with an absolute URL or relative URL.

     - Select **Absolute URL**, and in the **Absolute URL** box, specify the fully qualified URL of the location of the folder in SharePoint.

       - OR -

     - Select **Relative URL**. In **Relative URL**, to create a relative document location to the existing site or document location record, select the existing SharePoint site or document location record. In the second box, enter the name of the SharePoint folder.

   - **Regarding**. Choose the **Lookup** button . In the **Look Up Record** dialog box, in the **Look for** list, select the type of records you want to find. search and select the record for which you want to create the location record in Dynamics 365, and choose **OK**.

5. Choose **Save and Close**.

> **NOTE**
> To activate or deactivate a document location, on the **Document Locations** page, select the document location record, and choose **Activate** or **Deactivate**.

**See also**

Create or add a location for the first time

# Permissions required for document management tasks

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The following table shows the default security roles or other permissions that are needed to perform each document management with SharePoint task.

> **IMPORTANT**
> If you're using Dynamics 365 for Outlook, you can't do any of these tasks while you're offline.

| TASKS RELATED TO DOCUMENT MANAGEMENT | MINIMUM SECURITY ROLE OR OTHER PERMISSION REQUIRED |
|---|---|
| Enable or disable document management | Security roles: System Administrator or System Customizer<br><br>Privileges: Read, Write on all record types that are customizable.<br><br>SharePoint site permissions: Create, Read, Write, Append, Append To |
| Create or edit site records | Security roles: System Administrator or System Customizer<br><br>SharePoint site permissions: Site Create, Read, Write, Append, Append To |
| Create or edit document location records | Security roles: Salesperson<br><br>SharePoint site permissions: Read, Append To<br><br>SharePoint Document Location permissions: Create, Read, Write, Append, Append To |
| Install Microsoft Dynamics CRM List Component | Security roles: No Dynamics 365 security role needed.<br><br>SharePoint site permissions: Site collection administrator |
| Run the Enable Server-based SharePoint Integration Wizard | Security roles: System Administrator<br><br>Privileges: All other security roles will require the Run SharePoint Integration Wizard permission to run the Enable Server-based SharePoint Integration Wizard in Dynamics 365. |
| Make a site your default site | Security roles: System Administrator or System Customizer<br><br>SharePoint site permissions: Read, Write |

| TASKS RELATED TO DOCUMENT MANAGEMENT | MINIMUM SECURITY ROLE OR OTHER PERMISSION REQUIRED |
|---|---|
| Validate sites | Security roles: System Administrator or System Customizer<br><br>SharePoint site permissions: Read, Write |
| Add or edit a document location from a record | Security roles: Any<br><br>SharePoint site permissions: Read, Append To<br><br>SharePoint Document Location permissions: Create, Read, Write, Append, Append To |
| Fix a broken location | Security roles: Any<br><br>SharePoint Document Location permissions: Read, Write |
| Manage documents | Security roles: Any<br><br>SharePoint Document Location permissions: Read, Write |

## See also

Manage Your Documents
Validate and fix SharePoint Site URLs

# Validate and fix SharePoint site URLs

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

In Dynamics 365, SharePoint site and document location records contain links to site collections, site, document libraries, and folders in SharePoint. These site and document location records are associated with Dynamics 365 records so that the documents for Dynamics 365 records can be stored in SharePoint.

When the links between Dynamics 365 and SharePoint break, you must validate and fix the links so that the Dynamics 365 records continue to point to the correct document libraries and folders for managing the documents.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Find and fix the URLs. To do this, follow these steps.

   a. Go to **Settings** > **Document Management**.

   b. Click **SharePoint Sites**.

   c. Select the site URLs that you want to validate, and then click or tap **Validate**.

3. Dynamics 365 validates all the selected site URLs and their immediate subordinate site and document library URLs. It then displays the results in **Validating Sites**.

4. To fix a URL, open the site record, and enter the correct URL. More information: Create or edit site records.

5. Click **Save & Close**.

**See also**

Create or edit site records

# Connect to Social Engagement

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Your customers and stakeholders are talking about you on Facebook, Twitter, or blogs. How do you learn about it? In Dynamics 365, you can get powerful social insights by connecting Dynamics 365 to Microsoft Social Engagement. Microsoft Social Engagement collects data from social media websites and presents it to you in charts and graphs that you can use to spot emerging trends in people's comments, whether they're positive, negative, or neutral. You can drill down into the data and see who is mentioning you, where they posted the comment, and exactly what they said. Armed with these insights, you can pinpoint what you're doing right, and address potential issues before bigger problems arise.

With social insights, you bring social media data directly into Dynamics 365 dashboards and entity forms. As an administrator, you configure the connection to Microsoft Social Engagement and add the Social Insights controls to the entity forms and system dashboards. You use the Social Insights controls to specify what social data you want to see and in what form you want this data to be presented to you. When you set up the Social Insights controls, you choose a search topic or search topic category and visuals. For the search topic you may choose your company name to listen to what is said in social media about your company or your product. Or, you may want to know what is being said about your accounts; if so, choose the Accounts search topic category. After you choose the search topic or search category, you pick the visuals. It can be a graph or chart, or some other visual representation of data. You can find a lot of interesting, useful, and easy to follow information about social listening and social insights in Dynamics 365 in this book: eBook: Microsoft Social Engagement for CRM.

> **NOTE**
> Before you can set up the Social Insights controls in Dynamics 365, you have to add search topic categories and visuals for your Dynamics 365 organization in Microsoft Social Engagement. You can add search topics in Microsoft Social Engagement directly from within Dynamics 365. See the Microsoft Social Engagement Help Center

## Connect Dynamics 365 (online) to Social Engagement for Social Insights

To configure the connection, you need to have a subscription to Microsoft Social Engagement, be an authorized Microsoft Social Engagement user and have a Microsoft Social Engagement instance provisioned for this Dynamics 365 instance.

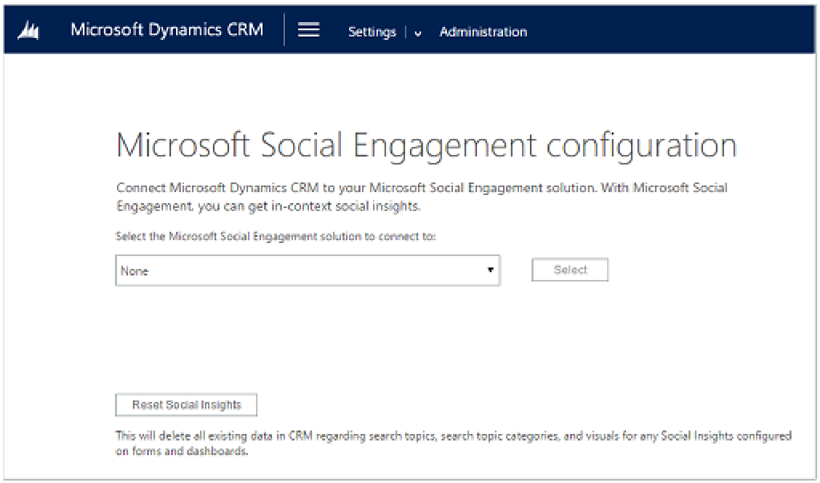
> **NOTE**
> You must ensure that your Dynamics 365 domain is added to the list of allowed domains in Microsoft Social Engagement.
>
> More information: Connect Social Engagement to other domains

1. Click **Settings** > **Administration** > **Microsoft Social Engagement Configuration**.

2. Click **Continue** to accept the legal disclaimer.

> **NOTE**
>
> You're asked to accept this disclaimer when you connect for the first time.

3. On the **Microsoft Social Engagement Configuration** page, in the **Select the Microsoft Social Engagement solution to connect to** dropdown box, choose the Microsoft Social Engagement instance to which you want to connect. Choose the **Select** button next to the dropdown box. The **Select** button becomes grayed out to indicate that the selection is confirmed.




> **WARNING**
>
> If you want to switch to a different Microsoft Social Engagement instance, you are asked to confirm it by clicking or tapping the **Confirm** button. Changing the Microsoft Social Engagement instance, may cause any existing Social Insights controls on forms and dashboards to display error messages, because the new instance may not have matching data. All existing Social Insights controls may need to be reconfigured. Also, the existing Social Insights data in Dynamics 365 may need to be reset to remove references to the old instance data.

> **NOTE**
>
> In Dynamics CRM Online Spring '14, only one Microsoft Social Engagement instance is provided for connection to the Dynamics 365 instance.

## Assign Social Engagement licenses to Dynamics 365 users

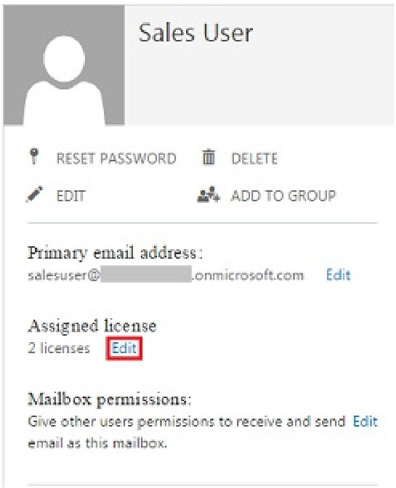
Dynamics 365 (online) customers automatically have access to Microsoft Social Engagement as part of their subscription at no additional charge. .

Use the Office 365 admin portal to assign and verify Microsoft Social Engagement licenses.

1. Browse to the Office 365 admin portal (https://portal.office.com) and sign in using Global administrator credentials.

2. Choose **Users** > **Active Users** and select a user to assign a license.

3. On the right side of the page, under Assigned license, choose **Edit**.




4. Expand Dynamics 365 (online). Select the check box for Microsoft Social Engagement and choose **Save**.

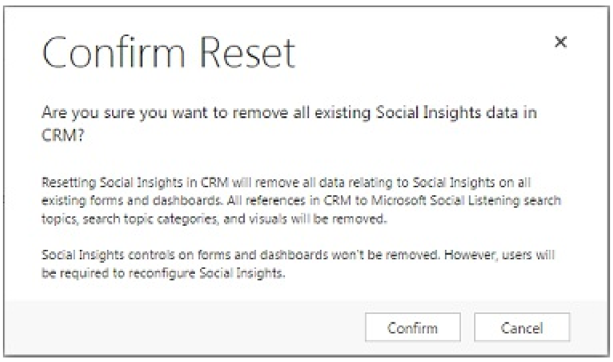

> **NOTE**
>
> If your subscription is not eligible for Microsoft Social Engagement, see Microsoft Dynamics Social Solutions.

## Reset Social Insights

> **WARNING**
>
> This action deletes all existing data in Dynamics 365 for the search topics, search topic categories and visuals for Social Insights.

1. Click **Settings** > **Administration** > **Microsoft Social Engagement Configuration**.

2. On the **Microsoft Social Engagement Configuration** page, choose **Reset Social Insights**. The **Reset Social Insights Confirmation** message box appears, choose **Confirm**, if you want to proceed, otherwise choose **Cancel**.




## Add the Social Insights control to a Dynamics 365 entity form

To add Social Insights controls to an entity (record type) form, you have to use the form editor provided in the Dynamics 365 **Customization** area. You can position the Social Insights control anywhere on the form and resize it, just like you would do with the **iFrame** controls. You can make the control bigger by increasing the number of rows and spanning the control over several columns. This is important if you want to make a graph or a chart in the control appear larger and be more readable. More information: Use the Form Editor.

1. Click **Settings** > **Customizations** > **Customize the System**.

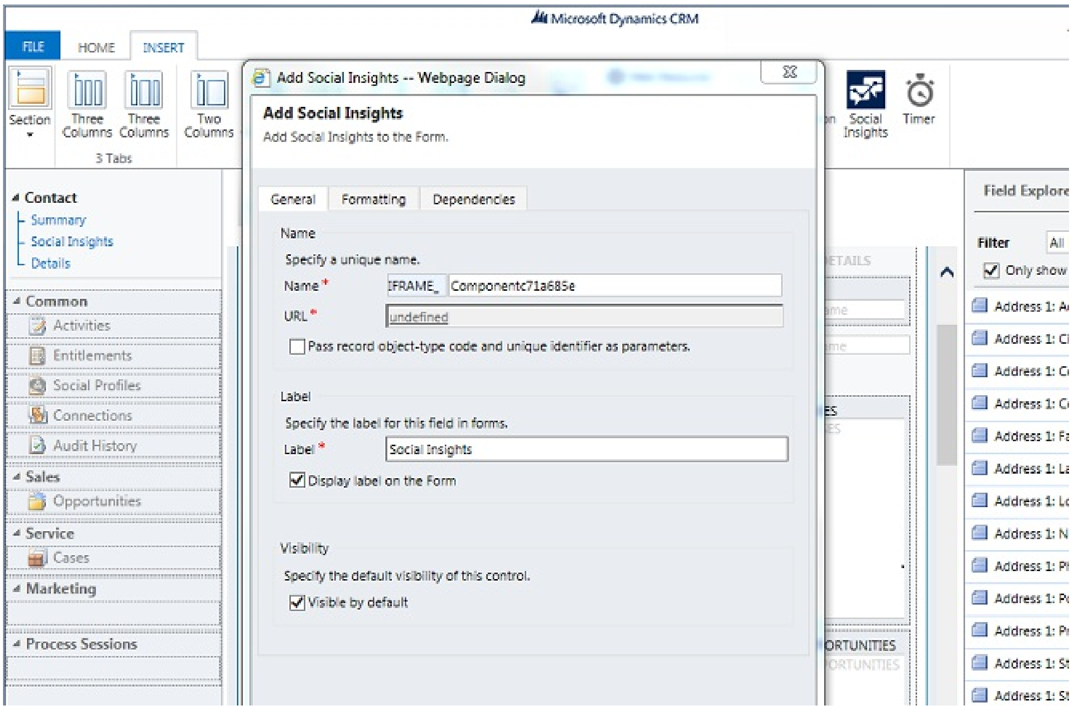
2. In the Navigation Pane, under **Components**, expand **Entities**.

3. Expand the entity that you want to add the **Social Insights** control to. Choose **Forms**.

4. In the grid view, choose the entity's Main form. The entity form opens.

5. Select the **Insert** tab. At the top of the form, on the ribbon, click the **Social Insights** icon. In the setup dialog box, fill out the required fields, such as the unique name of the control and the label name.

   Click to enable **Pass record object-type code and unique identifier as parameters**.

6. Click **OK**. The Social Insights control is now added to the entity form. You can resize the control or move the control to another location on the form.

7. Switch back to the **Home** tab. Choose **Save** and then choose **Publish** to publish the added customizations. The control called **Configure Social Insights** appears on all records based on this form. The search topics, search categories and visuals can be added to the control.

> **NOTE**
> You don't need administrator permissions to set up Social Insights on the entity record.

# Add and set up Social Insights controls on the system dashboards

> **NOTE**
> You don't need administrator permissions to add and set up Social Insights controls on the personal dashboard.

You can add the Social Insights controls to the existing system dashboards or to a new dashboard. Let's create a new dashboard and add the Social Insights control to it. We'll use the **Set Up Social Insights** wizard to lead us through the setup. Shortly after the setup is finished and customizations are published, the charts and graphs with social data will appear on your dashboard.

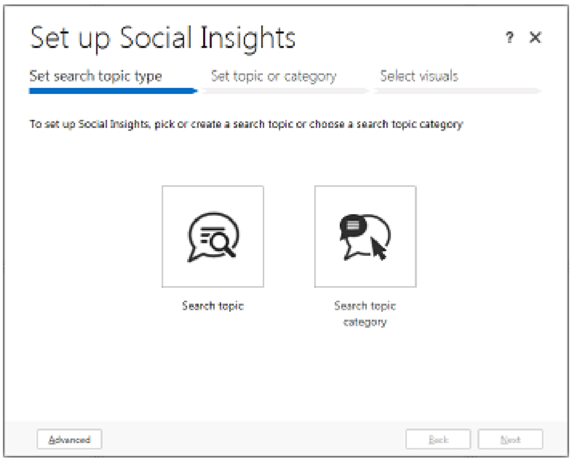
1. Click **Settings** > **Customizations** > **Customize the System**.

2. In the Navigation Pane, under **Components**, choose **Dashboards**.

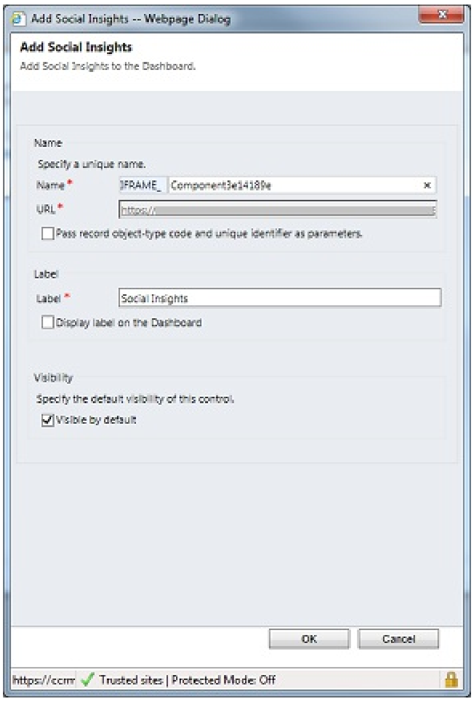
3. Choose **New** on the command bar. Choose a layout and choose **Create**.

4. On the dashboard form, enter the name of the dashboard in the **Name** text box and choose **Save**.

5. To add the control, choose **Insert Social Insights** icon in the center of the section on the dashboard form, or choose **More Commands** (•••) on the command bar and then choose **Social Insights** in the dropdown list. **Set Up Social Insights** wizard appears.



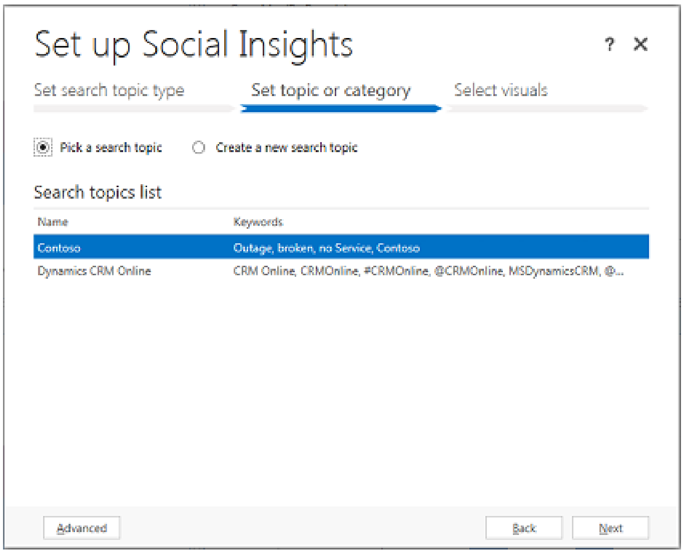

6. In the **Set Up Social Insights** wizard, choose **Advanced**. The **Add Social Insights** dialog appears. Fill in the required fields and choose **OK**. You can also use the default values and choose **OK** or **Cancel** to close the dialog box.



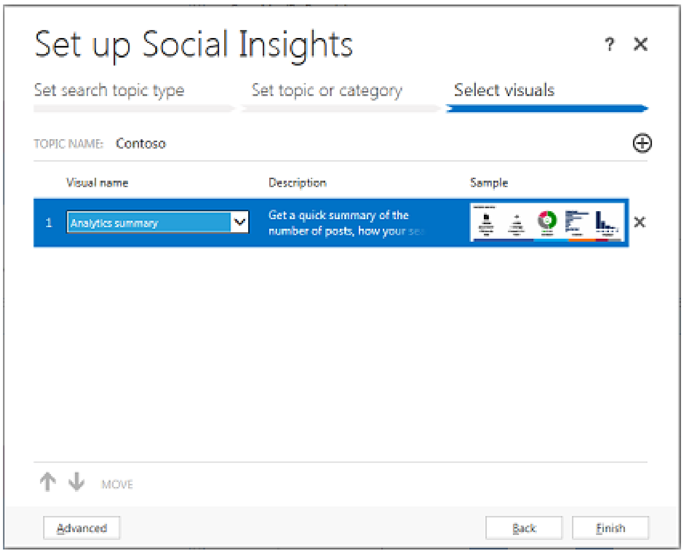

7. In the **Set Up Social Insights** wizard main window, choose **Search topic** or **Search topic category**, and then choose **Next**.

8. To pick the search topic or the search topic category, in the dropdown list, choose the topic or the category, depending on what you chose in the previous step and then choose **Next**.

> **NOTE**
>
> You can create a new search topic, instead of choosing a search topic in the dropdown list. Choose **Create a new search topic**, fill in the required fields and choose **Next**.

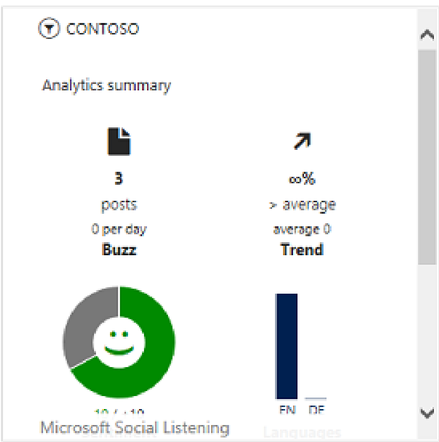



9. In the visuals drop-down list, choose a graph or a chart you want, such as **Analytics summary**, **Recent posts** or **Trends**. You can add as many visuals as you want and move them up and down the list using the **MOVE UP** and **MOVE DOWN** arrows. You can also delete a visual by clicking or tapping the delete icon displayed to the right of the visual. Choose **Finish**.




10. On the command bar, choose **Save** and then choose **Close**.

11. To publish the customizations, choose **Publish All Customizations** on the command bar. After the customizations are published, you can see the social insights on your dashboard.




## Privacy notice

By enabling Social Engagement, you consent to share your data with an external system. Data that is imported from external systems into Microsoft Dynamics 365 (online) is subject to Microsoft Privacy and Cookies.

**See also**

Manage social data
eBook: Microsoft Social Engagement for CRM
Microsoft Social Engagement Help Center

# Install the Social Selling Assistant

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Set up the Social Selling Assistant and onboard your users in just a few minutes. First, a Microsoft Dynamics 365 admin needs to install the Social Selling Assistant in Dynamics 365 and connect it with Microsoft Social Engagement. Then, a Microsoft Social Engagement admin refines the configuration in Microsoft Social Engagement to enable the best possible experience when users are working with the Social Selling Assistant.

## Prerequisites

To install and set up the app, make sure you meet the following prerequisites.

- Your organization updated to December 2016 Update for Microsoft Dynamics 365 (online) or a later version.
- You have a license assigned for both Microsoft Dynamics 365 (online) and Social Engagement
- You have a system admin or a customizer role in Microsoft Dynamics 365 (online).
- To update the additional configuration in Microsoft Social Engagement, you need at least the following permissions.
  - An administrator configuration role to configure custom tags in order to promote posts.
  - At least a power analyst configuration role to create search topics or edit topics you own.
  - At least a responder interaction role to share social profiles you own.

More information: Understand user roles

## Install the Social Selling Assistant app from AppSource

Before users can start working with the app, you need to install it from AppSource in Dynamics 365.

**Get it from Microsoft AppSource**

1. As a system administrator in Dynamics 365, go to **Settings** > **Dynamics Marketplace**.
2. In the AppSource dialog, search for **Social Selling Assistant**.
3. Click **Get** to start the installation, accept the disclaimer and follow the dialog guiding you through the installation.

## Access the Social Selling Assistant

When you install the app, the system configures a new mobile-friendly dashboard in Dynamics 365.

**Get to the Social Selling Assistant dashboard**

1. As a system administrator in Dynamics 365, go to **Sales** > **Dashboards**.
2. In the drop-down list under **System Dashboards**, select **Social Selling assistant dashboard**.
3. Configure the dashboard according to your user's needs.

Alternatively, you can access the Social Selling Assistant using the app module in Dynamics 365 or using the main navigation in Microsoft Social Engagement.

## Establish the connection between Dynamics 365 and Microsoft Social Engagement

The data in the Social Selling Assistant comes from Microsoft Social Engagement. To access this data from within Dynamics 365, you need to connect the two services. You can skip this step if you already connected Dynamics 365 and Microsoft Social Engagement from another integration scenario.

> **NOTE**
>
> You must ensure that your Dynamics 365 domain is added to the list of allowed domains in Microsoft Social Engagement.
>
> More information: Connect Social Engagement to other domains

For instructions how to set up the connection, see: Connect to Social Engagement, Integrate Social Engagement with Dynamics 365

**See also**

Extend Dynamics 365 with integration and solutions
Connect to Microsoft Social Engagement
Install or remove a preferred solution

# Control receiving social data

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can enable or disable your ability to receive social data in Dynamics 365.

## Enable or disable social engagement

By default, social engagement is enabled and social data is received.

> **NOTE**
> If you disable social engagement, you can no longer create or update social data in Dynamics 365. If you try to convert a social activity to a case while social engagement is disabled, you'll get an error message. The error occurs because the **Convert To Case** action tries to update the social activity **Regarding** field. The same error occurs if you try to assign a social activity record or a social profile record to another user.

1. Go to **Settings** > **Administration**.
2. Choose **System Settings**.
3. Under **Disable Social Engagement**, select **Yes** to stop receiving social data in Dynamics 365. To receive data, select **No**.
4. Choose **OK**.

**See also**

Connect to Microsoft Social Engagement
Receive social data in Microsoft Dynamics CRM

# Manage Bing Maps for your organization

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Learn how you can manage Bing Maps for your entire Dynamics 365 organization. When Bing Maps is turned on, people see a map of a customer's location when they view contacts, leads, or accounts.

## Turn Bing Maps on or off for your organization

1. Go to **Settings** > **Administration**.
2. Choose **System Settings**.
3. On the **General** tab, scroll down to **Enable Bing Maps** > **Show Bing Maps on forms**, and then select **Yes** or **No**.
4. Choose **OK**.

## Languages supported in Dynamics 365 for viewing Bing Maps

The following table contains a list of all languages supported in Dynamics 365 for viewing Bing maps. If the language is listed, the Bing map is shown on the form, such as account, contact or lead, in your language. If the language is not listed, the map is not shown on the form. Instead, the link **Click here to view the map** is provided on the form. When you choose this link, you are taken directly to Bing Maps. Bing Maps are not available in all countries, regions, or languages. You may not be able to see the map in your language, if it is not supported by Bing Maps. For a list of supported languages, countries and regions, see Bing Maps documentation.

| LANGUAGE | CULTURE CODE |
| --- | --- |
| Czech | cs-CZ |
| Danish | da-DK |
| Dutch (Netherlands) | nl-BE |
| Dutch (Netherlands) | nl-NL |
| English (Australia) | en-AU |
| Canada (English) | en-CA |
| English (India) | en-IN |
| English (United Kingdom) | en-GB |
| English (United States) | en-US |
| Finnish | fi-FI |

| LANGUAGE | CULTURE CODE |
| --- | --- |
| French (France) | fr-FR |
| French (Canada) | fr-CA |
| German (Germany) | de-DE |
| Italian (Italy) | it-IT |
| Japanese | ja-JP |
| Norwegian (Bokmål) | nb-NO |
| Portuguese (Brazil) | pt-BR |
| Portuguese (Portugal) | pt-PT |
| Spanish (Spain) | es-ES |
| Spanish (United States) | es-US |
| Spanish (Mexico) | es-MX |
| Swedish (Sweden) | sv-SE |

# Privacy notice

If you use Microsoft Dynamics 365, the Bing Maps feature automatically sends the address over the Internet to the Bing Maps service to display an online map of the address within Dynamics 365. If you click on the Bing Maps within Dynamics 365, you will be redirected to www.bing.com/maps. Your use of Bing Maps is also governed by the Bing Maps End User Terms of Use.

Your administrator can turn the Bing Maps feature on or off in the **Settings** > **Administration** > **System Settings** area. Turning the Bing Maps app off disables the feature within Dynamics 365.

Information sent to Bing Maps is subject to Microsoft Privacy and Cookies.

**See also**

# Enable embedded Flow to automate processes

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Flow lets you create automated processes between your favorite apps and services. The ability to run flows from within Dynamics 365 makes it simple for users to combine a broad spectrum of services that can be initiated from within Dynamics 365, such as messaging, social engagement, and document routing services.

Dynamics 365 instances use the default Flow environment. For more information about Flow environments, see Using environments within Microsoft Flow

The embedded Flow feature is not available in the following service or geographic regions.

- Microsoft Dynamics 365 Government
- Germany
- United Kingdom (UK)
- South America

  Once the embedded Flows feature is enabled, the following privileges are added in the **Miscellaneous** section of the **Customization** tab for security roles.

- Name: prvFlow
- Name: prvFlow

## Prerequisites

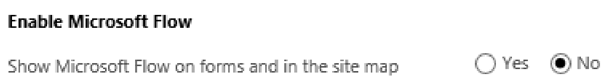
- A Flow connection for Dynamics 365 (recommended). More information: Connectors
- One or more flows created in the Flow environment to use with Dynamics 365. More information: Create a flow by using Dynamics 365 (online)

## Enable or disable Flow in your Dynamics 365 organization

By default, all security roles allow users to run flows on the records that they have access to.

To enable or disable embedded Microsoft Flows in your organization, follow these steps.

1. Go to the **Settings** > **Administration** > **System Settings** > **Customization** tab.
2. Enable or disable Flow in your organization.
   - To enable, under **Enable Microsoft Flow** click **Yes**.
   - To disable, under **Enable Microsoft Flow** click **No**.



3. Click **OK** to close System Settings.

**See also**

Create and edit web resources

# Live Assist for Dynamics 365 powered by Café X

7/31/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x


Live Assist for Microsoft Dynamics 365 Powered by CaféX is a fully integrated omnichannel solution. With Live Assist for Microsoft Dynamics 365 Powered by CaféX, create more personalized, intelligent experiences within websites and apps using chat and co-browse. Features include:

- Agents interact with customers within Dynamics 365: Full integration with Dynamics 365 customer engagement and Unified Service Desk for Dynamics 365 means agents interact with their customers via chat without leaving the Dynamics 365 application.
- Live omnichannel: Customers connect with your agents across mobile and web.
- Proactive customer engagement with chat: Customer assistance via chat that provides contextual customer information to agents including past history, preferences, and purchases.
- Faster problem solving with co-browse: View your customer's app or browser with sensitive data hidden.

> **IMPORTANT**
>
> - This feature is currently available in North America (NAM), Canada (CAN), and Europe, Middle East, Africa (EMEA) regions.

## Next steps

View the resources available on liveassistfor365.com for more information.

# Deploy packages using Dynamics CRM Package Deployer and Windows PowerShell

8/24/2018 • 12 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Microsoft Dynamics CRM Package Deployer enables administrators to deploy packages on a Dynamics 365 (on-premises) or Dynamics 365 (online) instance. A "package" can consist of any or all of the following:

- One or more Dynamics 365 solution files.
- Flat files or exported data files from the Configuration Migration tool. For information about the Configuration Migration tool, see Manage your configuration data.
- Custom code that can run during or after the package is deployed to Dynamics 365.
- HTML content specific to the package that can display at the beginning and end of the package deployment process. This can be useful to provide a description of the solutions and files that are deployed in the package.

  Developers create packages by using the package deployment template in Visual Studio. More information: Create packages for the Dynamics 365 Package Deployer

  After a package is created, you can deploy it either by running CRM Package Deployer or by using Windows PowerShell cmdlets for the tool.

> **IMPORTANT**
> Before you import and run a package in a production organization, test the package on a non-production mirror image of the production organization.
>
> Always back up the production organization before you deploy a package.

## Deploying packages using the Package Deployer tool

You can use the Package Deployer tool (packagedeployer.exe) to deploy packages in the following ways.

Use CRM Package Deployer tool to deploy packages

Use CRM Package Deployer tool at the command line

## Use Package Deployer tool to deploy packages

The Package Deployer tool can only process one package at a time. However, it provides users with the ability to select a package to deploy from multiple packages available in the Package Deployer tool directory. Some of the screens and actions in the tool differ based on the package definition. You do not have to install the Package Deployer tool. Just download and run it.

1. Obtain the package to be deployed. A package is a collection of files and folders that is created in your Visual studio project folder (<*Project*>\Bin\Debug) when you build your package project in Visual Studio.

Copy the following from your project debug folder:

- **<PackageName> folder**: This folder contains the solutions, import configuration, and the contents for your package.
- **<PackageName>.dll**: The assembly contains the code for your package. By default, the name of the assembly is the same as your Visual Studio project name.

  For detailed information about creating a package by using Visual Studio, see Create a package for the Package Deployer tool.

  For this topic, let us assume that the package folder and assembly from the Visual Studio project debug folder (<*Project*>\Bin\Debug) are copied to the `c:\DeployPackage` folder.

2. Obtain the Package Deployer tool. The Package Deployer tool is available as a NuGet package. To use the Package Deployer, you must download and extract it to your local computer using **nuget.exe.**

   Download **nuget.exe** from https://www.nuget.org/downloads, and save it to your computer, say **d:**. Then run the following command at the command prompt to extract the package contents to a folder, say **PD**, on your computer:

   ```
   d:\nuget install Microsoft.CrmSdk.XrmTooling.PackageDeployment.Wpf -Version [VERSION] -O d:\PD
   ```

   After you have extracted the Package Deployer tool, browse to the `[ExtractedLocation]\tools` folder to find the **PackageDeployer.exe** file.

3. Copy the package folder and assembly from the `c:\DeployPackage` to the `[ExtractedLocation]\tools` folder.

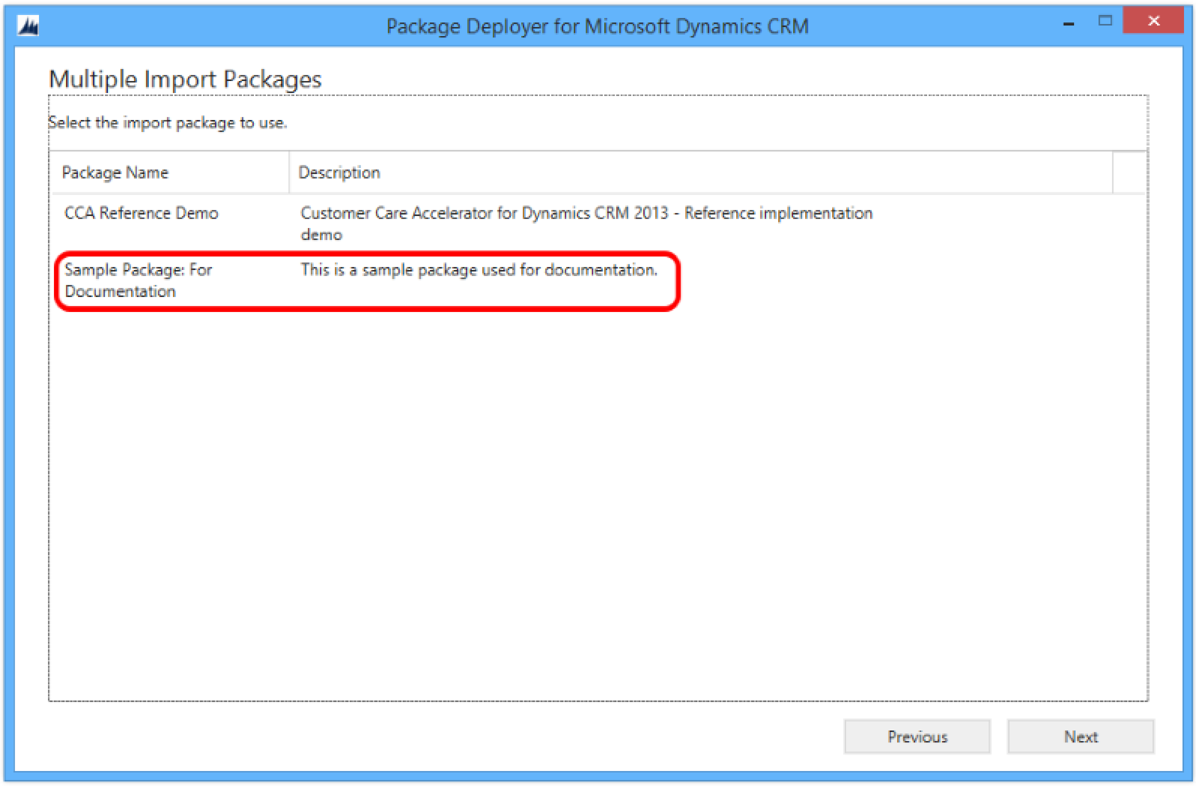
4. After the files are copied, run the tool by double-clicking the `PackageDeployer.exe` file in the `[ExtractedLocation]\tools` folder.

5. Click **Continue** on the main screen of the tool.

6. In the **Connect to Microsoft Dynamics 365** screen, provide authentication details to connect to your Dynamics 365 server where you want to deploy the package. If you have multiple organizations, and want to select the organization where you want to deploy the package, select the **Always display list of available orgs** check box. Click **Login**.

7. If you have multiple organizations on your Dynamics 365 server, select a Dynamics 365 organization to connect to.

8. Select the package to be deployed, and click **Next**.




9. Follow the instructions on the subsequent screens to complete the deployment of your package.

   The screens appear based on the definition of the package that you selected for deployment. For an end-to-end package deployment that uses the Package Deployer tool, see the topic for the deployment of Unified Service Desk packages: Deploy sample Unified Service Desk applications to CRM Server using Package Deployer

## Use Package Deployer tool at the command line

System administrators and customizers can pass parameters, such as a regional language code, to packagedeployer.exe from the command line. These parameters may only be configured by running Package Deployer tool at the command line.

> **NOTE**
> This feature was first introduced in Dynamics CRM Online 2016 Update 0.1.

Available parameters are in this table.

| PARAMETER | DESCRIPTION | DEFAULT VALUE |
| --- | --- | --- |
| RuntimePackageSettings | Instructs packagedeployer.exe to accept command line parameters such as LCID and SkipChecks. | Not applicable |
| LCID=*localeID* | Specifies the locale ID, such as 1033 for English-United States or 1036 for French-France, from the available locale IDs in the package. If not specified, the default language will be used. | Use the default language |

| PARAMETER | DESCRIPTION | DEFAULT VALUE |
|---|---|---|
| SkipChecks=true/false | Use this parameter only when the target environment does not contain any other solutions or customizations. When set to true, solution import will bypass some safety checks, which can improve performance of the import. | False |

The following example instructs CRM Package Deployer to bypass some safety checks and sets the language to import as Polish.

```
packagedeployer.exe RuntimePackageSettings SkipChecks=true | lcid=1045
```

**NOTE**

Use the pipe character | to separate parameters when you run packagedeployer.exe at the command line with multiple parameters.

For more information about the parameters and values that can be passed to packagedeployer.exe, see Create packages for the CRM Package Deployer.

# Use Windows PowerShell to deploy packages

The Package Deployer tool also provides Windows PowerShell support to deploy packages.

Perform the following steps to use the PowerShell cmdlets to deploy packages:

Prerequisites

Import the Package Deployer PowerShell module

Use the cmdlet to retrieve packages

Use the cmdlet to connect to your Dynamics 365 server

Use the cmdlet to deploy packages

Get detailed help on cmdlets

### Prerequisites

Here are the prerequisites for using the PowerShell cmdlets:

- PowerShell 3.0 or later is required to deploy a package by using PowerShell. To check your PowerShell version, run a PowerShell window, and then run the following command: `$Host`
- Set the execution policy to run the signed PowerShell scripts. To do so, run a PowerShell window as an administrator, and then run the following command: `Set-ExecutionPolicy -ExecutionPolicy AllSigned`

### Import the Package Deployer PowerShell module

You must import the Windows PowerShell module for the Package Deployer tool before you can use it. To import:

1. Obtain the PowerShell files for the Package Deployer. The PowerShell files for the Package Deployer tool are available as a NuGet package. To use them, you must download and extract it to your local computer using **nuget.exe.**

   Download **nuget.exe** from https://www.nuget.org/downloads, and save it to your computer, say **d:**. Then run the following command at the command prompt to extract the package contents to a folder, say **PD-PowerShell**, on your computer:

```
d:\nuget install Microsoft.CrmSdk.XrmTooling.PackageDeployment.PowerShell -Version [VERSION] -O d:\PD-PowerShell
```

After you have extracted the PowerShell files for the Package Deployer tool, browse to the `[ExtractedLocation]\tools` folder to find the required files.

2. Start Windows PowerShell on your computer with elevated privileges (run as administrator).

3. At the prompt in the Windows PowerShell window, change your directory to the folder where you extracted the files. In this case:

```
cd [ExtractedLocation]\tools\
```

4. Run the `RegisterXRMPackageDeployment.ps1` script available at the `[ExtractedLocation]\tools` folder by running the following command:

```
.\RegisterXRMPackageDeployment.ps1
```

You are now ready to use the Windows PowerShell cmdlets. To list the cmdlets that you registered, run the following command at the prompt in the Windows PowerShell window:

```
Get-Help “Crm”
```

#### Use the cmdlet to retrieve packages

Before you can use the cmdlet, ensure that you have copied your package to the **PackageDeployer** folder (in this case, `[ExtractedLocation]\tools`). A package is a collection of files and folders that is created in your Visual Studio project folder (<*Project*>\Bin\Debug) when you build your project in Visual Studio. Copy the entire contents of your project debug folder to the **PackageDeployer** folder. For detailed information about building a package using Visual Studio, see Create packages for the CRM Package Deployer.

1. In the PowerShell window, use the following cmdlet to return a list of packages available for import in the specified folder (in this case, c:\CRM\SDK\Tools\PackageDeployer):

```
Get-CrmPackages –PackageDirectory [ExtractedLocation]\tools
```

2. If you want information about a package in a folder, you can use the **Get-CrmPackages** cmdlet along with the **–PackageName** parameter to specify the name of the assembly in the folder that contains the package definition.

```
Get-CrmPackages –PackageDirectory [ExtractedLocation]\tools –PackageName SampleCRMPackage.dll
```

3. The package assembly location can be stored in a variable by using the Get-CrmPackages cmdlet. Then it may be reused in the Import-CrmPackage cmdlet to specify a value for the PackageDirectory parameter. For example, you can store the information of one or more packages returned from the Get-CrmPackages cmdlet in a variable called $MyPackages.

```
$MyPackages = Get-CrmPackages –PackageDirectory [ExtractedLocation]\tools
```

To display all the packages.

```
$MyPackages
```

To display only the third package.

```
$MyPackages[2].PackageAssemblyLocation
```

Then, you can reference each package in the array from 0 through n. For example, this cmdlet imports the first package found in $MyPackages.

```
Import-CrmPackage -CrmConnection $CRMConn -PackageDirectory $MyPackages[0].PackageAssemblyLocation
```

#### Use the cmdlet to connect to your Dynamics 365 instance

1. Provide your credentials to connect to your Dynamics 365 (online) or Dynamics 365 (on-premises) instance. Running the following command will prompt you to type your user name and password to connect to the Dynamics 365 instance, and we will store it in the `$Cred` variable, and use it later for connecting to your Dynamics 365 server.

   ```
   $Cred = Get-Credential
   ```

2. Use the following command to get a connection to your Dynamics 365 (online) or Dynamics 365 (on-premises) instance. We will store the connection information in the `$CRMConn` variable:

   - If you are connecting to the Dynamics 365 (on-premises) instance:

     ```
     $CRMConn = Get-CrmConnection -ServerUrl http://<your_CRM_Server> -OrganizationName
     <your_Org_Name> -Credential $Cred
     ```

   - If you are connecting to the Dynamics 365 (online) server:

     ```
     $CRMConn = Get-CrmConnection -DeploymentRegion NorthAmerica –OnlineType Office365 –
     OrganizationName <your_Org_Name> -Credential $Cred
     ```

     > **NOTE**
     >
     > For the `DeploymentRegion` parameter, valid values are `NorthAmerica`, `EMEA`, APAC `SouthAmerica`, `Oceania`, `JPN`, and `NorthAmerica2`. For the `OnlineType` parameter, valid values are `Office365` and `LiveID`.

3. Your supplied credentials are validated when you run the command in step 2.

#### Use the cmdlet to deploy packages

Next, use the Dynamics 365 connection information stored in the `$CRMConn` variable to deploy packages to the Dynamics 365 instance. The following command deploys a package, disassembles the package in the *c:\UnpackedFiles* folder, and records information to a log file in the *c:\MyLogFiles* folder.

```
Import-CrmPackage –CrmConnection $CRMConn –PackageDirectory c:\CRM\SDK\Tools\PackageDeployer –PackageName
SampleCRMPackage.dll –UnpackFilesDirectory c:\UnpackedFiles -LogWriteDirectory C:\MyLogFiles -Verbose
```

> **NOTE**
>
> - `CrmConnection`, `PackageDirectory`, and `PackageName` parameters are mandatory.
> - Instead of manually specifying the package folder, you can use a variable with the PackageDirectory parameter. More information: Use the cmdlet to retrieve packages
> - For the `PackageName` parameter, you have to specify the name of the assembly that contains the package definition.
> - You do not need to specify the `UnpackFilesDirectory` parameter if your package does not unpack files during package deployment. While defining a package in Visual Studio, you specify whether to unpack files using the **agentdesktopzipfile** parameter in the ImportConfig.xml file. More information: Create packages for the CRM Package Deployer
> - The `Verbose` parameter is optional, and is used to display a detailed log of the activities performed during the package deployment process.
> - The optional `RuntimePackageSettings` parameter can be used together with the following parameters:
>     - The `LCID=localeID` parameter specifies the locale ID, such as 1033 for English-United States or 1036 for French-France, from the available locale IDs in the package. If not specified, the default language will be used.
>     - The `SkipChecks=true/false` parameter should only be used when the target environment does not contain any other solutions or customizations. When set to true, solution import will bypass some safety checks, which can improve import performance.
> - The folder that you specify when you use the `LogWriteDirectory` parameter must already exist, and the user who is running the Import-CrmPackage cmdlet must have write permission to the folder. Additionally, the -Verbose parameter is required when you use the LogWriteDirectory parameter.
>
>   The LogWriteDirectory parameter was first introduced with Dynamics 365 (online), version 9.0. More information: Dynamics 365 Customer Engagement Developer Guide

The following example command imports a package named *SampleCRMPackage* and specifies English-United States (1033) as the language to import the package.

```
Import-CrmPackage –CrmConnection $CRMConn –PackageDirectory c:\CRM\SDK\Tools\PackageDeployer –PackageName
SampleCRMPackage.dll –UnpackFilesDirectory c:\UnpackedFiles –RuntimePackageSettings LCID=1033
```

### Get detailed help on cmdlets

In the PowerShell window, use the `Get-Help` cmdlet with a cmdlet name to view a detailed help for the cmdlet. For example, to get detailed help for the `Import-CrmPackage` cmdlet:

```
Get-Help Import-CrmPackage -full
```

To view the online help for the cmdlets, see Dynamics 365 PowerShell Reference.

## Troubleshoot package deployment issues by using log files

The Package Deployer tool provides logging support to get detailed information about errors that can occur when someone signs in to the Microsoft Dynamics 365 instance using the tool and deploying packages. By default, the tool generates three log files that are available at the following location on the computer where you run the tool: c:\Users\<*UserName*>\AppData\Roaming\Microsoft\Microsoft Dynamics CRM Package Deployer\<*Version*>. To specify a different folder, use the -LogWriteDirectory PowerShell cmdlet parameter. More information: Use the cmdlet to retrieve packages

- `Login_ErrorLog.log`: Provides information about the issues that occurred when you use the tool to sign in to the Dynamics 365 instance. If there are any issues during sign in, a message appears on the tool's login screen with a link to this log file. The message states that an error occurred while processing the login request and the user can view the error log. You can click the link in the message to view this log file. The log file is created the first time you encounter any sign-in issues in the tool. Thereafter, the log file is used to log information about a sign-in issue, whenever it occurs.

- `PackageDeployer.log`: Provides detailed information about each task performed in the tool during the deployment of the packages. You can view the log file from the tool by clicking the **View Log File** link at the bottom of the screen.

- `ComplexImportDetail.log`: Provides detailed information about the data imported in the last deployment by using the tool. Each time you deploy a package using this tool, the existing details from the log file are moved to a file called ComplexImportDetail._old.log in the same directory, and the ComplexImportDetail.log file displays information about the latest import done using the tool.

## Best practices for deploying packages

While deploying packages, Dynamics 365 administrators must:

- Insist on a signed package assembly so that they can track an assembly back to its source.

- Test the package on a pre-production instance (preferably a mirror image of the production instance) before running it on a production server.

- Back up the production instance before deploying a package.

**See also**

Create packages for the CRM Package Deployer

# Use Power BI

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

The Power BI for Office 365 cloud service works with Dynamics 365 to provide a self-service analytics solution. Power BI automatically refreshes the Dynamics 365 (online) data displayed. With Power BI Desktop or Office Excel Power Query for authoring reports and Power BI for sharing dashboards and refreshing data from Dynamics 365 (online), sales, marketing, and service personnel in your organization have a powerful new way to work with Dynamics 365 data.

## Get started using Power BI with Dynamics 365 (online)

The Dynamics 365 content packs for Power BI cloud service allow you to easily access and analyze your sales, service, or marketing data.

To create a Power BI dashboard using a content pack, follow these instructions.

1. If you haven't already done so, register with Power BI.
2. After you have signed in to Power BI, in the **Datasets** area click **Get Data**, under **Services** click **Get**, and then select from the following content packs.
   - **Dynamics 365 (online) Sales Manager**
   - **Dynamics 365 (online) Service Manager**
   - **Dynamics Marketing**
3. For the Sales Manager and Service Manager content packs, enter the URL of your Dynamics 365 (online) instance, such as *https://OrganizationName.crm.dynamics.com*, where *OrganizationName* is the organization name of your instance of Dynamics 365 (online), and click **Next**.

   > **NOTE**
   > If your data center is outside of North America the crm.dynamics.com domain name may be different, such as crm2.dynamics.com, crm3.dynamics.com, crm4.dynamics.com, etc. To find the domain name, in the Dynamics 365 web app go to **Settings** > **Customizations** > **Developer Resources**. The URLs listed will indicate the correct domain name.

   For the Marketing content pack, enter the URL as *https://OrganizationName.marketing.dynamics.com/analytics*, where *OrganizationName* is the organization name of your instance of Dynamics 365 (online), and click **Next**
4. Under **Authentication method**, select **oAuth2**.
5. Your Dynamics 365 (online) organization data is imported and several visualizations become available.

> **TIP**
> If the content pack you select does not open in your web browser, in the left pane of your Power BI workspace click the content pack under **Dashboards**.

**Content packs available for download.**

The Dynamics 365 content packs support the default out-of-box entities. However, you can customize the following content packs by downloading the .PBIX file and then using Power BI Desktop to customize the content pack before uploading it to the Power BI service.

- Download the Dynamics CRM Online Sales Manager .PBIX
- Download the Dynamics 365 (online) Service Manager .PBIX

  The Power BI Report Template for Connected Field Service for Dynamics 365 enables users to publish a Power BI report that displays the live heart beat of connected devices.

- Download the Power BI Report Template for Connected Field Service for Dynamics 365

  For information about how to customize the content packs, see Customize Dynamics 365 Power BI content packs.

## Embed Power BI visualizations on personal dashboards

Before users can embed Power BI visualizations on personal dashboards, the organization-wide setting must be enabled.

> **NOTE**
>
> This feature was first introduced in CRM Online 2016 Update 1.
>
> By default, Power BI visualization embedding is disabled and must be enabled before users can embed them in personal dashboards.

**Enable Power BI visualizations in the organization**

1. Sign-in to Dynamics 365 as a user with the system administrator security role.
2. Go to **Settings** > **Administration** > **System Settings**.
3. On the **Reporting** tab in the **Allow Power BI visualization embedding** option, select **Yes** to enable or **No** to disable.
4. Click **OK**.

To learn more about how to add Power BI tiles to personal dashboards in Dynamics 365, see Embed Power BI tiles on your personal dashboard .

To learn more about how to add Power BI dashboards to personal dashboards in Dynamics 365, see Add a Power BI dashboard on your personal dashboard.

## Use Power BI Desktop to connect directly to your Dynamics 365 (online) instance

You can connect to Dynamics 365 (online) with Power BI Desktop to create custom Dynamics 365 reports and dashboards for use with the Power BI service.

**Requirements**

- Power BI service registration
- Power BI Desktop.
- Dynamics 365 (online) instance

**Connect to Dynamics 365 (online)**

1. Start Power BI Desktop.
2. From the Home tab, click **Get Data**, and then click **More**.
3. In the Get Data list, select **Dynamics 365 Online**.
4. Enter the Dynamics 365 (online) OData endpoint URL. It should look similar to this URL, where *OrganizationName* is the name of your Dynamics 365 (online) organization, and **v8.1** is the version. Click **OK**.

   https://*OrganizationName*.api.crm.dynamics.com/api/data/*v8.1*

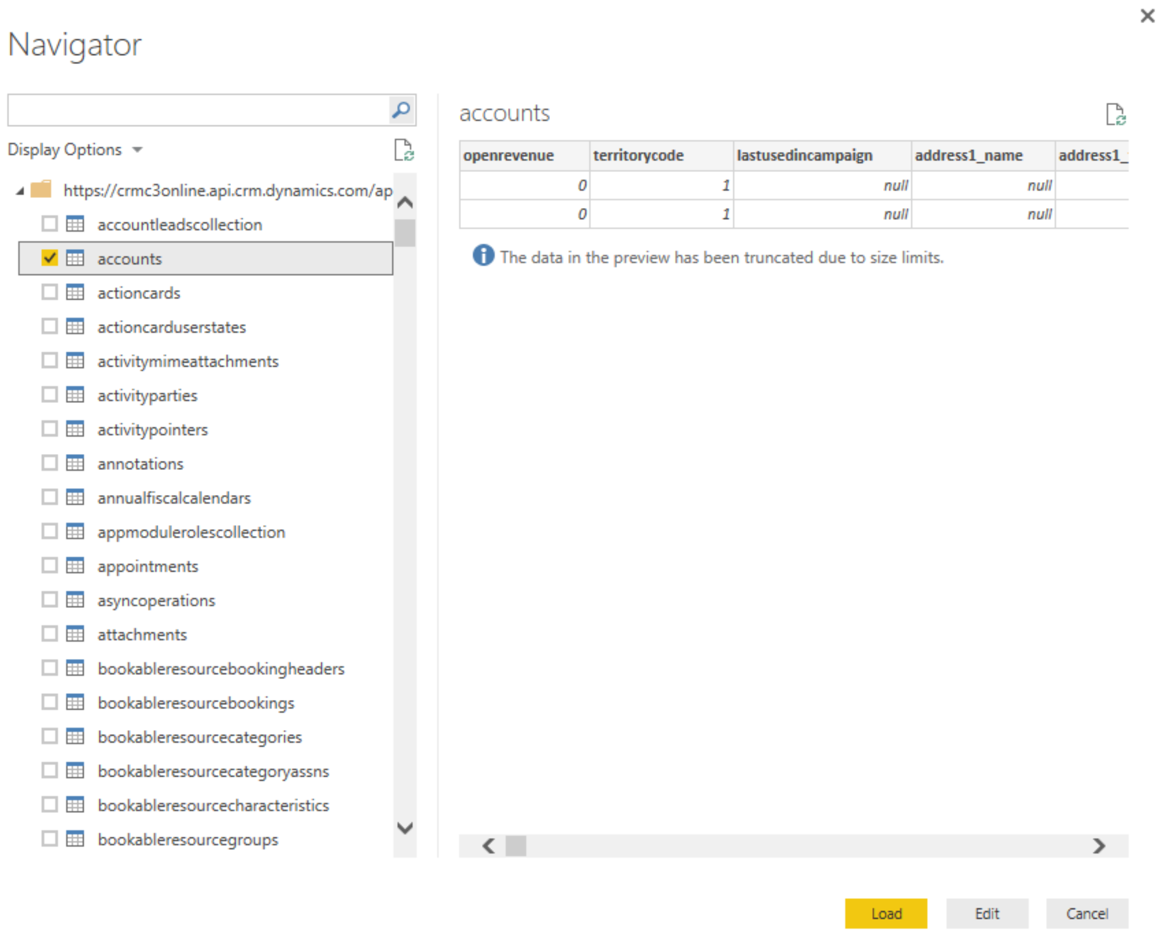
> **IMPORTANT**
> Currently, the Power BI service isn’t compatible with the Dynamics 365 (online) version 9.0 OData endpoint. When you try to use the version 9.0 OData endpoint with the Power BI service the error message “The feed's metadata document appears to be invalid” is displayed. To work around this incompatibility, use the Dynamics 365 (online) version 8.2 OData endpoint.For more information about the different endpoint versions, see Web API URL and versions.

> **TIP**
> You can find your OData endpoint URL in the Dynamics 365 web client. Go to **Settings** > **Customizations** > **Developer Resources** and locate the URL under **Instance Web API**.

5. In the Access an OData feed dialog click **Organizational account**, and then click **Connect**.

   > **NOTE**
   > If you aren't signed in to your Dynamics 365 (online) instance, click **Sign-in** on the Access OData feed dialog before you click Connect.

6. The organization database entity tables appear in the Power BI Desktop Navigator window. You can select both default and custom entities. For more information about creating reports with Power BI Desktop, see Power BI Support: Report View in Power BI Desktop.




**TIP**

You can use similar steps to connect to Dynamics 365 (online) using Office Excel Power Query by selecting **From Other Sources** on the **Power Query** tab in Excel.

## See also

# Preview feature: Set up Cortana integration

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

> **IMPORTANT**
>
> We are working to deliver a robust and scalable digital assistant experience across all of our Dynamics 365 offerings. This includes natural language integration for customers and partners across multiple channels including Cortana. To that end, we are discontinuing the current Cortana integration preview feature that was made available for Dynamics 365 and we are focusing on building a new long term intelligent solution experience, which will include Cortana digital assistant integration.

We're introducing Cortana integration to help salespeople keep track of important Dynamics 365 activities. CRM Online 2016 Update embeds sales activities, accounts, and opportunities into Cortana to surface what's most relevant to salespeople at any time.

Cortana integration is available as a Preview feature to organizations that use CRM Online 2016 Update. We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.

A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.

> **NOTE**
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

For more information about how to enable Preview features, see What are Preview features and how do I enable them?.

> **NOTE**
>
> Cortana integration with Dynamics 365 is a Preview feature. To use this feature, it must be turned on and the license terms must be accepted. What are Preview features and how do I enable them?.
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.
>
> This Preview feature was introduced in Dynamics CRM Online 2016 Update.

## Privacy notice

Cortana does not have access to the data stored in the Dynamics 365 database. Cortana only captures your voice commands. When you make a voice command through Cortana, in order to both understand the request and improve Microsoft speech recognition-related products and services, Microsoft uses proprietary technologies such as, for example, acoustic and natural language processing models to record and interpret your user's request. Voice-dictated Bing search queries are treated like other text-based search requests and may be used to improve Bing search results; however, the Dynamics 365-voice-dictated commands listed here are not used to provide advertising. For more information about privacy and Cortana, see Cortana and my privacy FAQ.

If you are an administrator, you can manage enterprise access to Cortana with the PolicyManager configuration service provider through a separate device management service. The policy for this is set at the phone level and can't be set just for the Dynamics 365 for phones app. For more information, see the MSDN topic PolicyManager configuration service provider.

**See also**

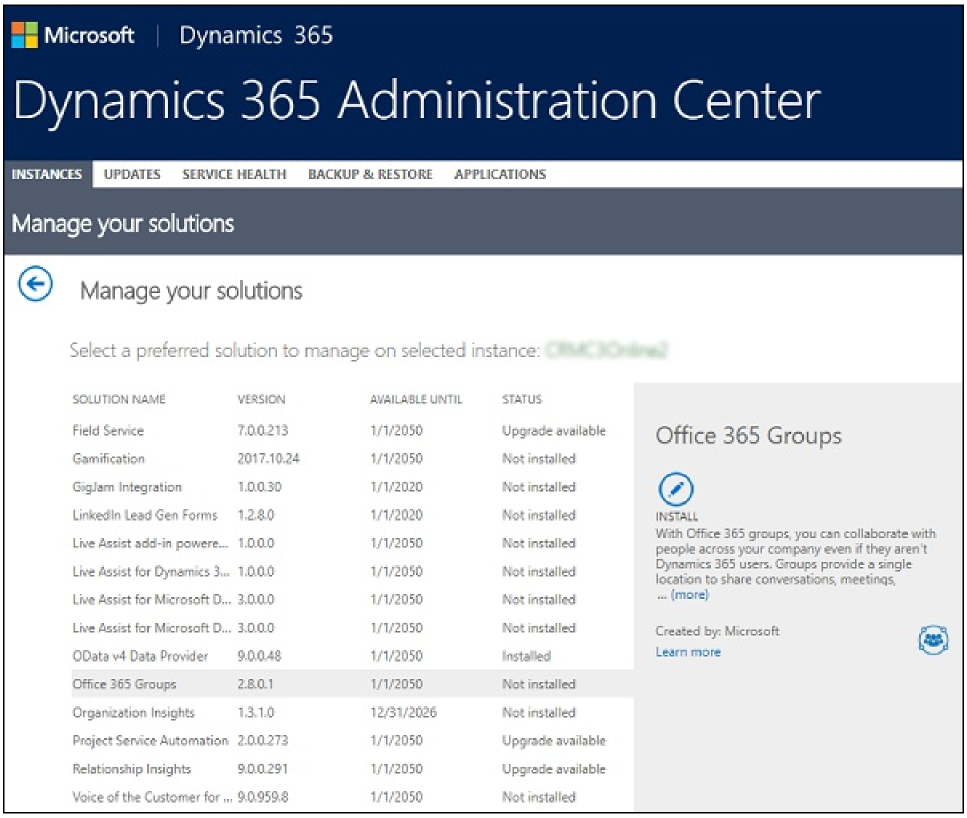
What are Preview features and how do I enable them?

# Install, update, or remove a preferred solution

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Install preferred solutions to gain added features and functionality for Dynamics 365 (online).




The list of available solutions varies. Some solutions like Office 365 groups for Dynamics 365 are freely available and visible by default. Trials for some solutions are gated and will only be visible if you go through **Settings** > **Dynamics Marketplace** or appsource.microsoft.com and sign up for the solutions. If you buy a new service subscription through Office Commerce, any associated solution installer also becomes visible in the **Solutions** tab after that purchase is recognized by the provisioning system.

## Install a preferred solution

1. Sign in to https://portal.office.com with your Global administrator or Dynamics 365 System Administrator credentials.
2. Select **Admin centers** > **Dynamics 365**
3. Select the **Instances** tab, and then select the instance to add the solution to.
4. Select **Manage your solutions** .
5. Select the solution you want to install and select **Install**.

   Proceed through **Terms of service** to accept the terms.

   The status for the solution changes to **Installation pending**.

   The status for the solution will change to **Installed** when the solution is ready.

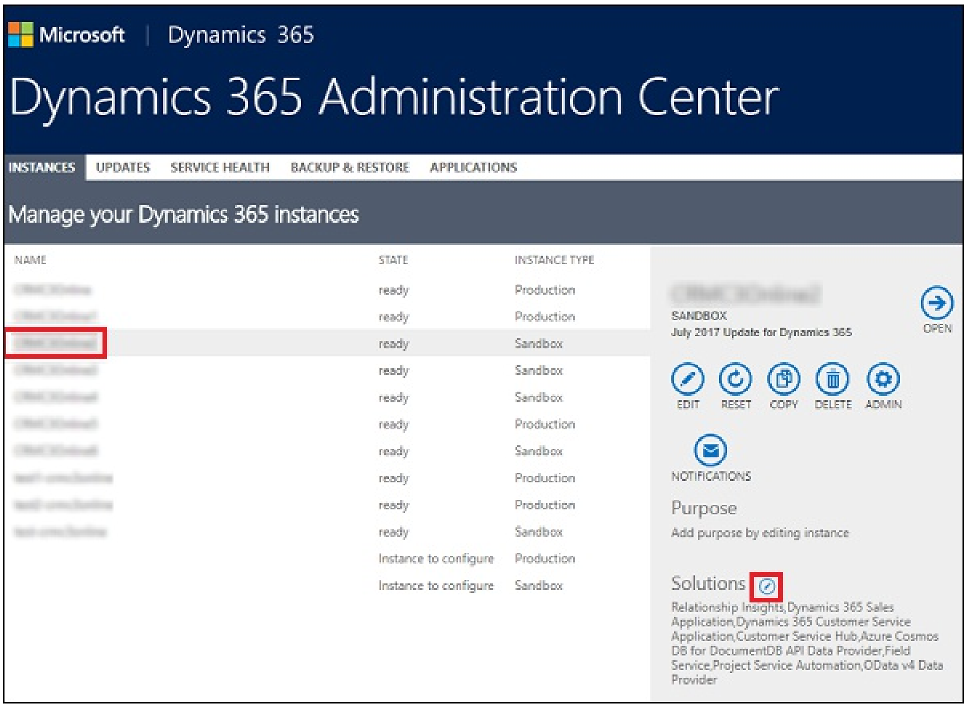
# Update a preferred solution

1. Sign in to https://portal.office.com with your Global administrator or Dynamics 365 System Administrator credentials.

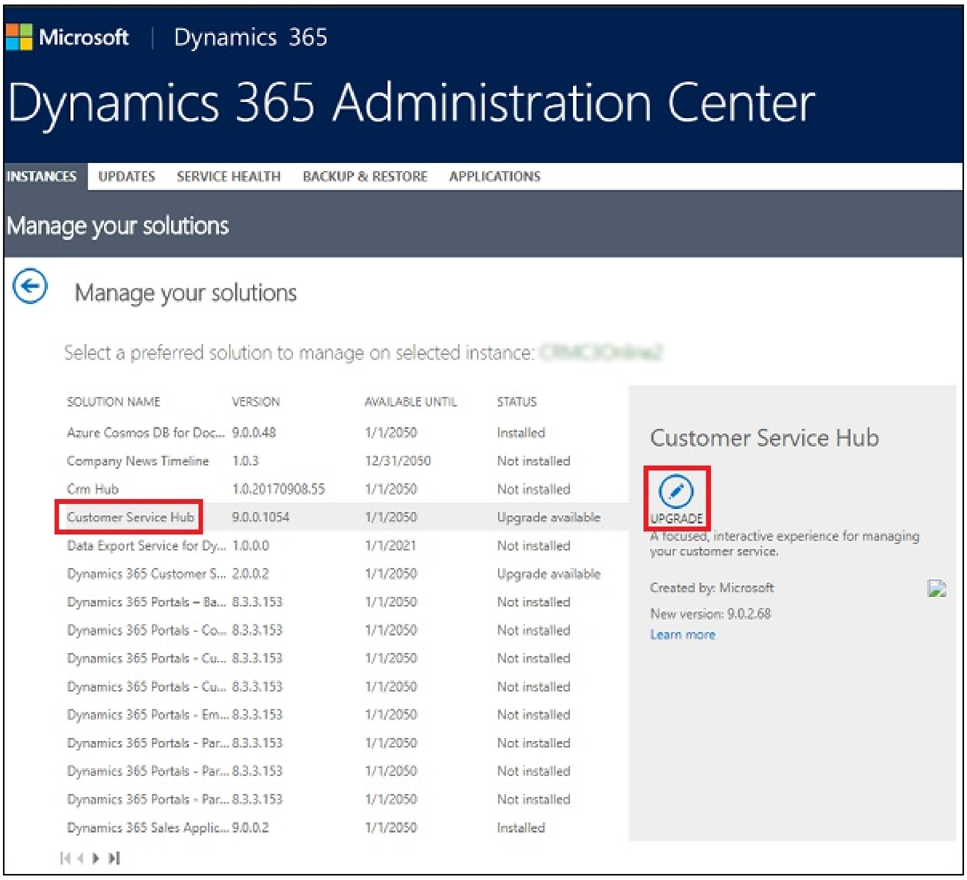
2. Select **Admin centers** > **Dynamics 365**

3. Select the **Instances** tab.

4. Select the instance with the solution to update, and then select **Manage your solutions** .




5. Select the solution you want to update, and then select **Upgrade**.



6. Proceed through **Terms of service** to accept the terms and start the upgrade.

## Delete a preferred solution

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.
2. Sign in to Dynamics 365.
3. Select **Settings** > **Solutions**.
4. Select a solution and select **Delete**.

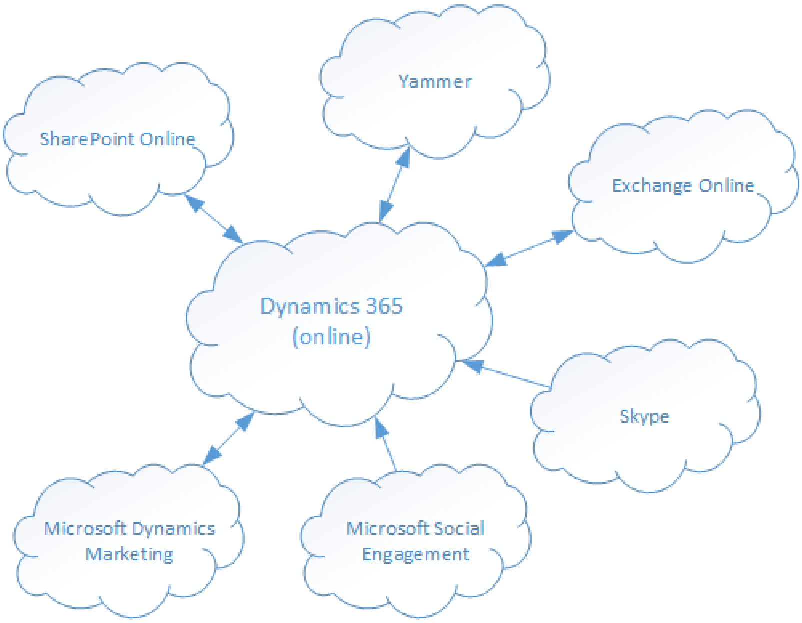
**See also**

# Add Office 365 Online services

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Integrating Office 365 with Dynamics 365 (online) is a great way to enhance your customer relationship management with the power of cloud services: easier maintenance, broader availability, and better coordination across multiple devices.




The following topics provide information on how to integrate Exchange Online, SharePoint Online, and Skype into Dynamics 365 (online).

**NOTE**

For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:

- Dynamics 365 pricing
- Dynamics 365 Licensing Guide

# Connect Dynamics 365 (online) to Exchange Online

9/8/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

With both Dynamics 365 (online) and Microsoft Exchange Online hosted as online services, connecting the two is a simpler, more straightforward configuration.

> **TIP**
> Check out the following video: Connect Dynamics 365 (online) to Exchange Online using server-side sync.

> **IMPORTANT**
> This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to Dynamics 365 (online)?

## Get Exchange ready

To use Exchange Online with Dynamics 365 (online), you must have an Exchange Online subscription that comes as part of an Office 365 subscription or that can be subscribed to separately. For information on Exchange Online, see:

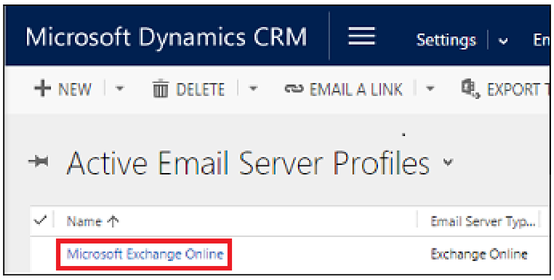
- Exchange Online
- Exchange Online Service Description
- Office 365 service comparison

> **TIP**
> To make sure you've got a good connection to Exchange Online, run the Microsoft Remote Connectivity Analyzer. For information on what tests to run, see Test mail flow with the Remote Connectivity Analyzer.

## Verify you have the profile: Microsoft Exchange Online

If you have an Exchange Online subscription in the same tenant as your Dynamics 365 (online) subscription, Dynamics 365 (online) creates a default profile for the email connection: **Microsoft Exchange Online**. To verify this profile:

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.
2. Click **Active Email Server Profiles** and check that the **Microsoft Exchange Online** profile is in the list.



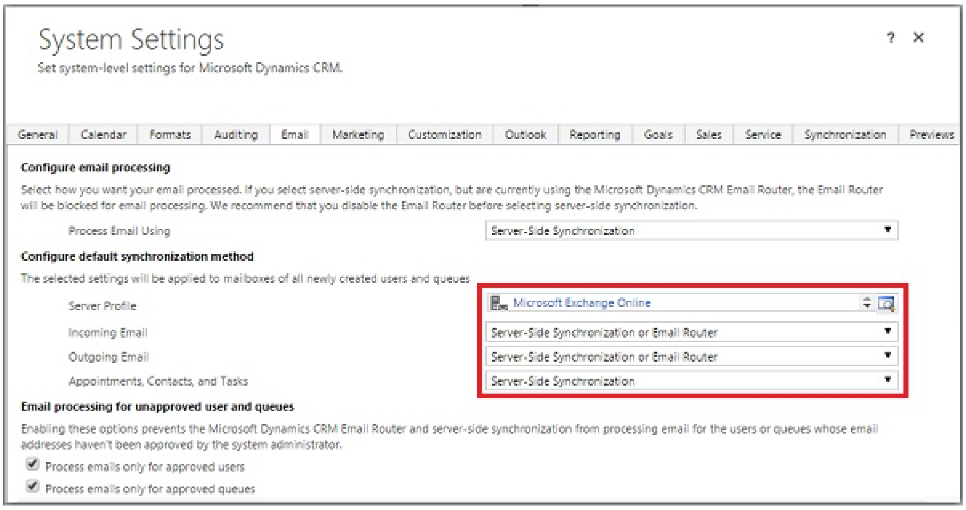

If the Microsoft Exchange Online profile is missing, verify you have an Exchange Online subscription and that it exists in the same tenant as your Dynamics 365 (online) subscription.

3. If there are multiple profiles, click the **Microsoft Exchange Online** profile and set it as default.

# Configure default email processing and synchronization

Set server-side synchronization to be the default configuration method for newly created users.

1. Go to **Settings** > **Email Configuration** > **Email Configuration Settings**.
2. Set the processing and synchronization fields as follows:
   - **Server Profile**: Microsoft Exchange Online
   - **Incoming Email**: Server-Side Synchronization or Email Router
   - **Outgoing Email**: Server-Side Synchronization or Email Router
   - **Appointments, Contacts, and Tasks**: Server-Side Synchronization or Email Router




3. Click **OK**.

All new users will have these settings applied to their mailbox.

# Configure mailboxes

New users will have their mailboxes configured automatically with the settings you made in the prior section. For existing users added prior to the above settings, you must set the Server Profile and the delivery method for email, appointments, contacts, and tasks.

In addition to administrator permissions, you must have Read and Write privileges on the Mailbox entity to set the delivery method for the mailbox.

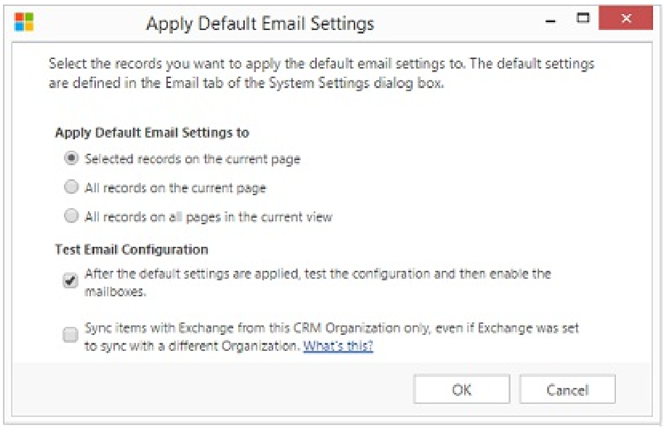
Choose **one** of the following methods:

**Set mailboxes to the default profile**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Choose **Active Mailboxes**.

3. Select all the mailboxes that you want to associate with the Microsoft Exchange Online profile, click **Apply Default Email Settings**, verify the settings, and then click **OK**.




By default, the mailbox configuration is tested and the mailboxes are enabled when you click **OK**.

**Edit mailboxes to set the profile and delivery methods**

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes that you want to configure, and then click **Edit**.

4. In the **Change Multiple Records** form, under **Synchronization Method**, set **Server Profile** to **Microsoft Exchange Online**.

5. Set **Incoming** and **Outgoing Email** to **Server-Side Synchronization or Email Router**.

6. Set **Appointments, Contacts, and Tasks** to **Server-Side Synchronization**.

7. Click **Change**.

# Approve email

You need to approve the email address of each user mailbox or queue before the mailbox can process email.

> **NOTE**
> You must be an Office 365 Global administrator to approve emails.

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes that you want to approve, and then click **More Commands** (**...**) > **Approve Email**.

4. Click **OK**.

# Test configuration of mailboxes

1. Go to **Settings** > **Email Configuration** > **Mailboxes**.

2. Click **Active Mailboxes**.

3. Select the mailboxes you want to test, and then click **Test & Enable Mailboxes**.

   This tests the incoming and outgoing email configuration of the selected mailboxes and enables them for email processing. If an error occurs in a mailbox, an alert is shown on the Alerts wall of the mailbox and the profile owner. Depending on the nature of the error, Dynamics 365 tries to process the email again after some time or disables the mailbox for email processing.

   To see alerts for an individual mailbox, open the mailbox and then under **Common**, click **Alerts**.

   The result of the email configuration test is displayed in the **Incoming Email Status**, **Outgoing Email Status**, and **Appointments, Contacts, and Tasks Status** fields of a mailbox record. An alert is also generated when the configuration is successfully completed for a mailbox. This alert is shown to the mailbox owner.

   You can find information on recurring issues and other troubleshooting information in Blog: Test and Enable Mailboxes in Microsoft Dynamics CRM 2015 and Troubleshooting and monitoring server-side synchronization.

   Make sure you've got a good connection to Exchange Online by running the Microsoft Remote Connectivity Analyzer. For information on what tests to run, see Test mail flow with the Remote Connectivity Analyzer.

> **TIP**
>
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

## Test email configuration for all mailboxes associated with an email server profile

1. Go to **Settings** > **Email Configuration** > **Email Server Profiles**.

2. Select the Microsoft Exchange Online profile, and then click **Test & Enable Mailboxes**.

   When you test the email configuration, an asynchronous job runs in the background. It may take a few minutes for the test to be completed. Dynamics 365 tests the email configuration of all the mailboxes associated with the Microsoft Exchange Online profile. For the mailboxes configured with server-side synchronization for synchronizing appointments, tasks, and contacts, it also checks to make sure they're configured properly.

> **TIP**
>
> If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this Dynamics 365 org only, even if Exchange was set to sync with a different org** check box. Read more about this check box.

**See also**

Troubleshooting and monitoring server-side synchronization
Test mail flow with the Remote Connectivity Analyzer

# Set up Dynamics 365 (online) to use SharePoint Online

9/20/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

When you use SharePoint Online with Dynamics 365 (online), you can:

- Create, upload, view, and delete documents stored in SharePoint from within Dynamics 365.
- Use the SharePoint document management abilities within Dynamics 365, such as checking the document in and out and changing document properties.
- Enable non-Dynamics 365 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: Configure SharePoint integration using the list component.

**TIP**

Check out the following video: Connect Dynamics 365 to SharePoint Online

To set up Dynamics 365 (online) to use SharePoint Online, complete the following steps.

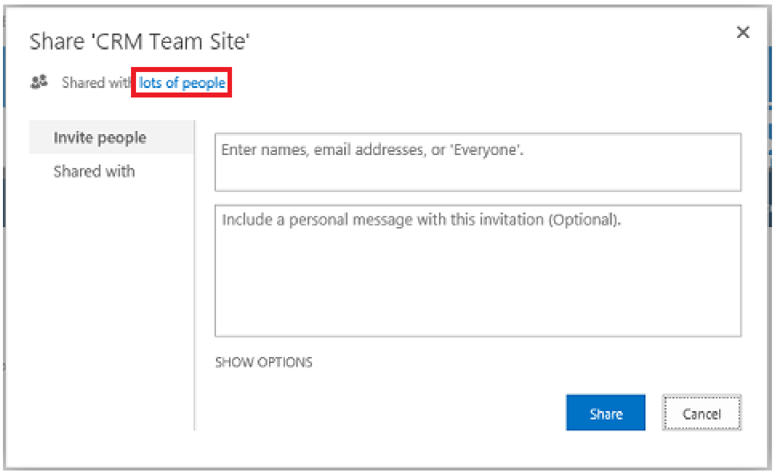
## Assign user permissions to the Team SharePoint site

Your Dynamics 365 (online) and 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 credentials.
2. Open the Office 365 app launcher, and then click **SharePoint**.
3. c. On the left-side menu, click **Team Site**.
4. On the Home page, click **SHARE** (upper-right corner).


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




6. By default, all users in your 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 Dynamics 365 (online) for SharePoint document management

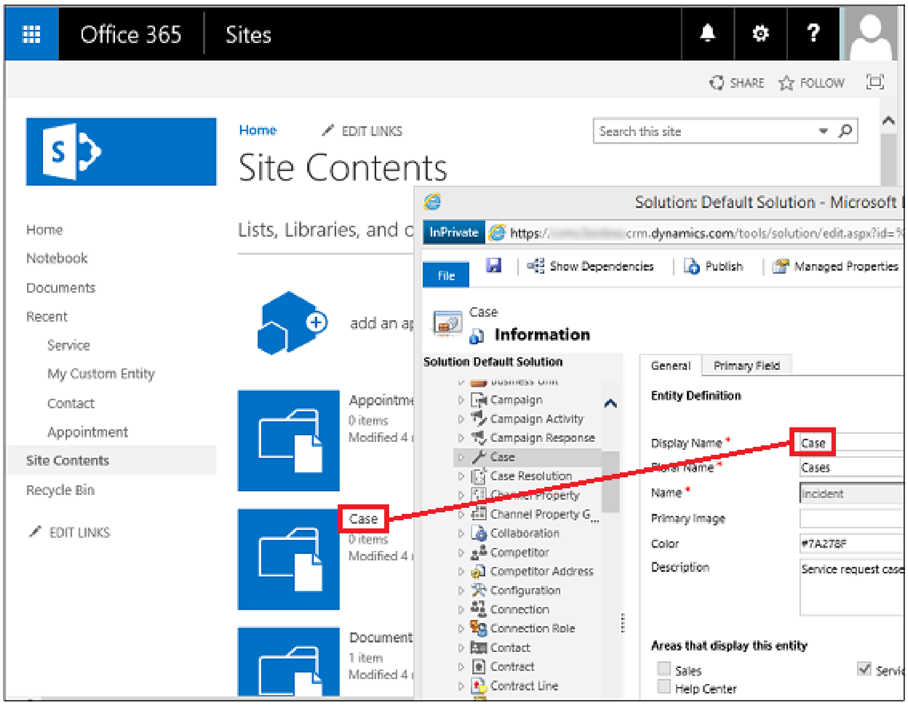
For Dynamics 365 (online) organizations, Dynamics CRM Online Spring '14 introduced a new server-based (using server-to-server authentication) SharePoint integration that removes the need to install or continue to use the Microsoft Dynamics CRM List Component solution.

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**

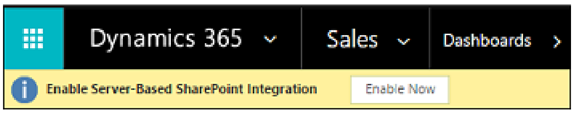
The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in Dynamics 365. Server-based SharePoint integration uses the entity display name. When you upgrade to server-based SharePoint integration, be sure to check that the display names in your document library on SharePoint match the entity display names in Dynamics 365. 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 Dynamics 365 organization has not deployed document management, when a Dynamics 365 System Administrator logs in an alert message will be displayed to enable server-based SharePoint integration.

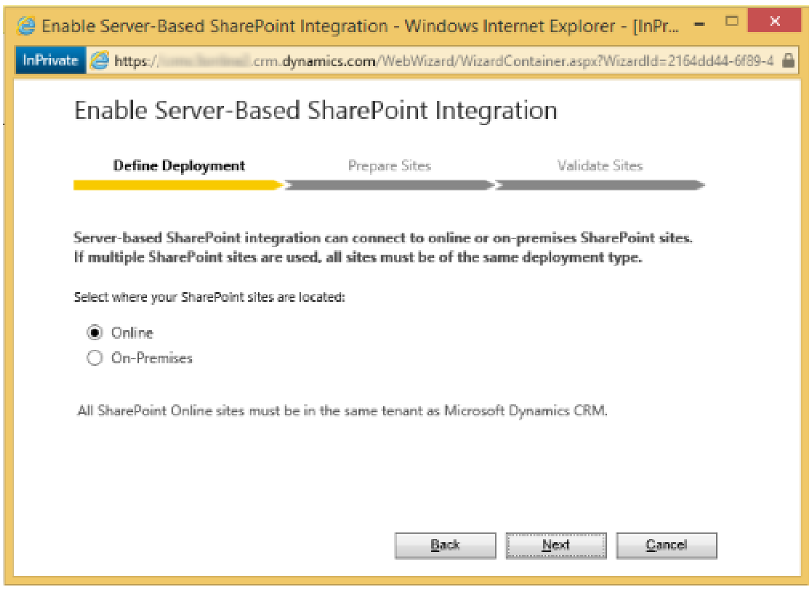



**NOTE**

If you don't see the alert and have not previously enabled server-based SharePoint integration, clear your browser cache or open Dynamics 365 using Internet Explorer with InPrivate browsing to have the alert display again. Once you configure server-based integration, the alert will no longer appear.

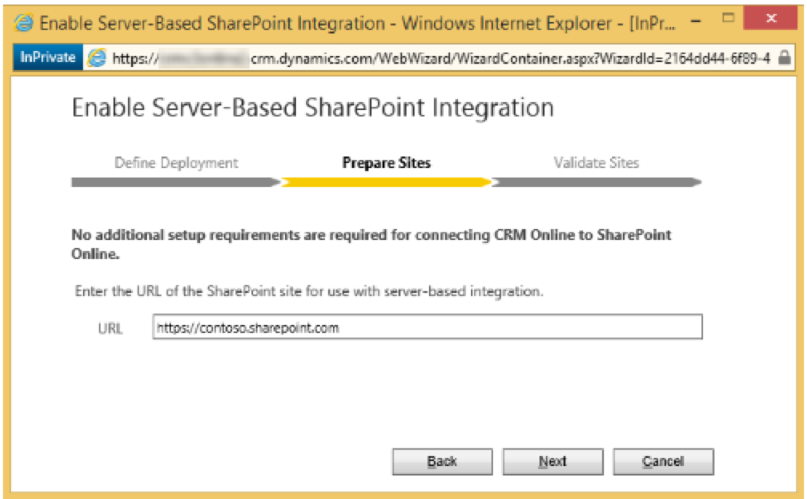
1. In the Enable Server-based SharePoint Integration alert click **Next**.

2. Choose **Online** for where your SharePoint sites are located, and then choose **Next**.



3. If your Dynamics 365 (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, click **Admin centers** > **SharePoint**, and then click **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 Dynamics 365 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: Enable document management on entities

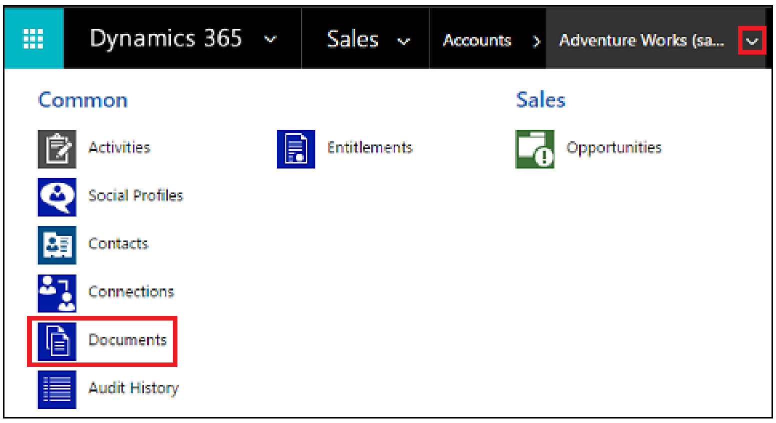
# Using Document Management

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).

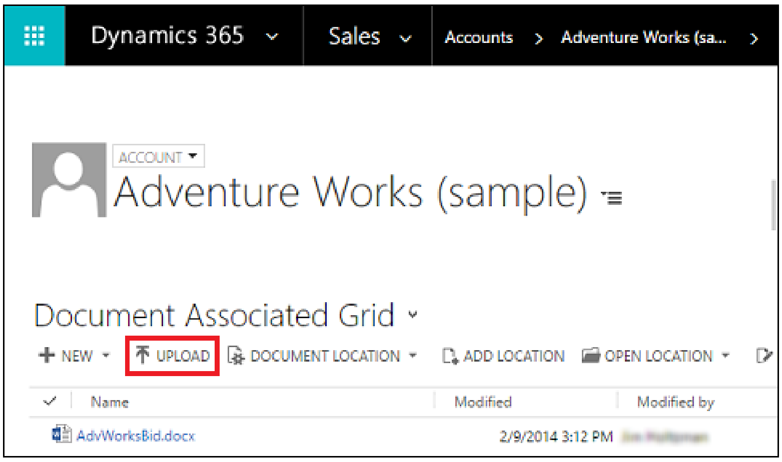
1. Browse to your Dynamics 365 (online) web application.

2. Choose an account, such as the **Adventure Works** sample account.

3. On the nav bar, click the down arrow next to the account name, and then click **Documents**.

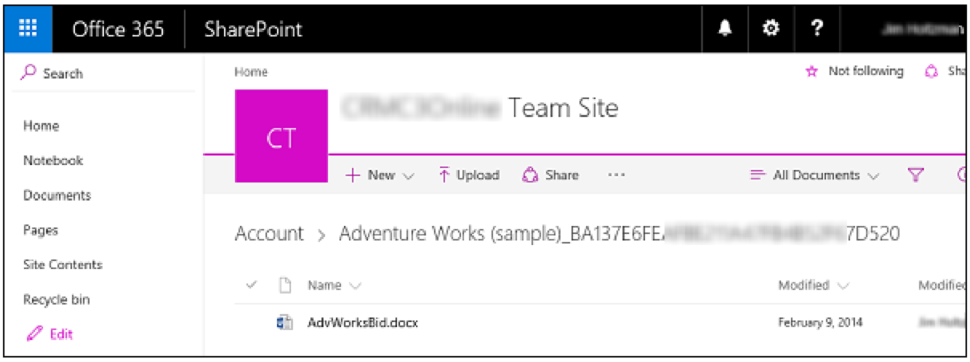


4. Click **Upload**, and then browse to a document to upload to the new folder in your Office 365SharePoint Online Team site.



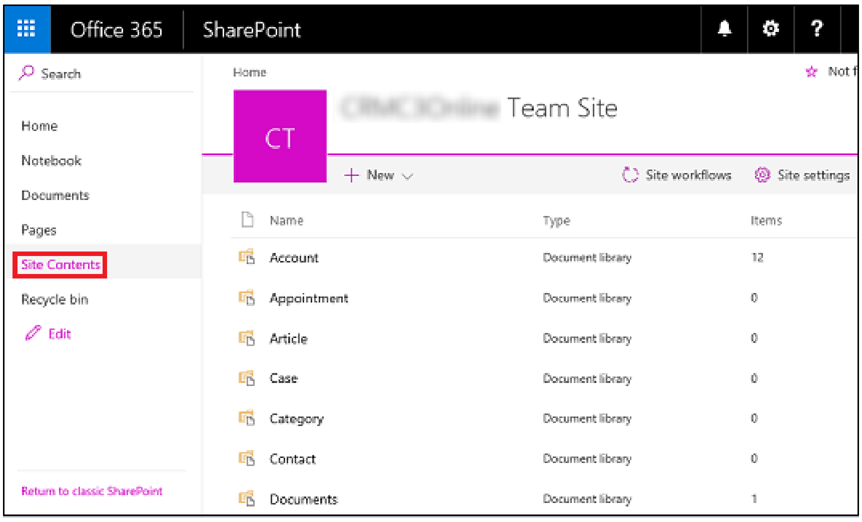

5. Select a Dynamics 365 folder location, and then click **Ok**.

6. To see the document in your Office 365SharePoint Online Team site, click to the left of the document name (you'll see a check mark), and then click **Open Location**.




7. Click **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).




**See also**

[Manage your documents using SharePoint]()

[SharePoint Online for IT pros]()

# Private Preview: Integrate Dynamics 365 Customer Engagement with Microsoft Teams

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

**IMPORTANT**

- This feature currently has limited availability.
- A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
- We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
- Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

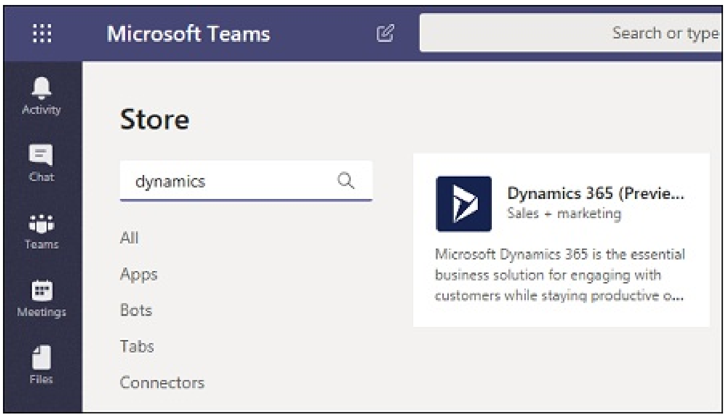
If you're familiar with Microsoft Teams, you know it's the place to manage all your conversations, files, and tools in one team workspace. Create and edit documents right in the app and enjoy instant access to SharePoint, OneNote, PowerBI, and now, Dynamics 365 (online).

Begin by finding the app in the app Store.

## Select the app in the app Store

1. In Microsoft Teams, select **Store**.


2. Search for **dynamics**, and then select the **Dynamics 365 (Preview)** tile.

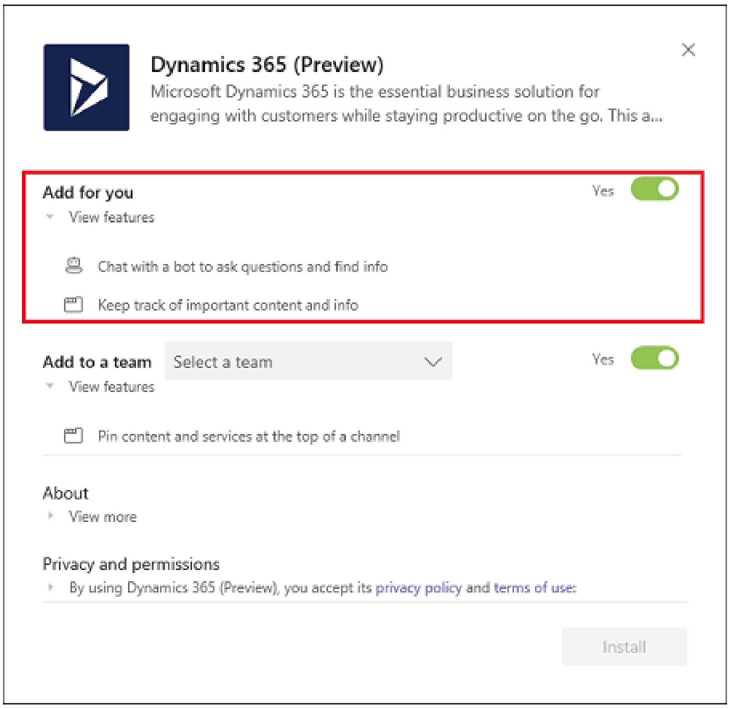



## Install the personal app

You have a choice when adding Dynamics 365 to Microsoft Teams. You can install the personal app which integrates Dynamics 365 and Teams for your own use, or you can install the Team app to use with your team members. These steps are for installing the personal app - the settings under **App for you**.

Once you've selected the Dynamics 365 app (see steps above), the settings page opens.

Verify **Yes** is enabled, and then select **Install** to install the personal app.

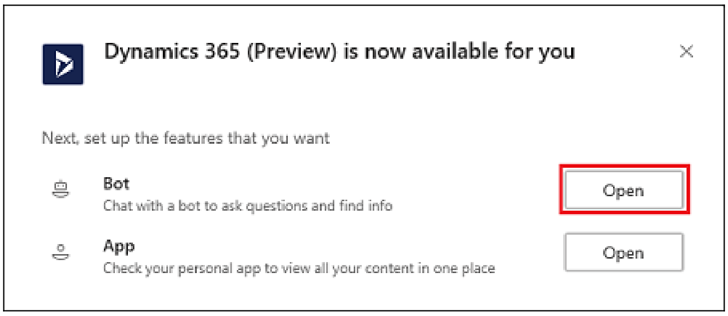



## Install the personal app bot

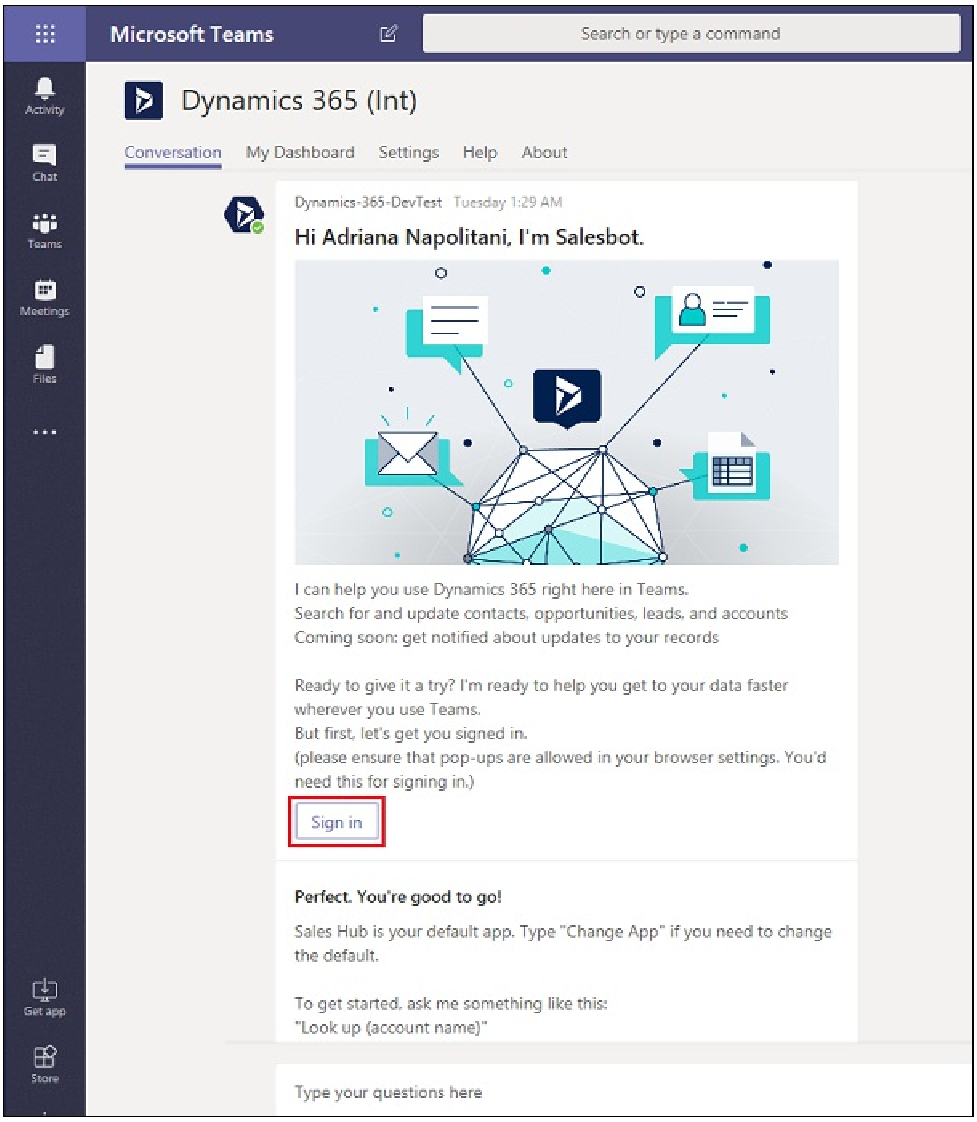
There are two personal app features: the personal app bot and the personal app dashboard. The bot allows you to interact with Dynamics 365 to find and display records within Microsoft Teams. You configure the dashboard to show a Dynamics 365 dashboard view in Microsoft Teams.

Use these steps to install the personal app bot.

1. With the personal app installed, in the bot section, select **Open**.

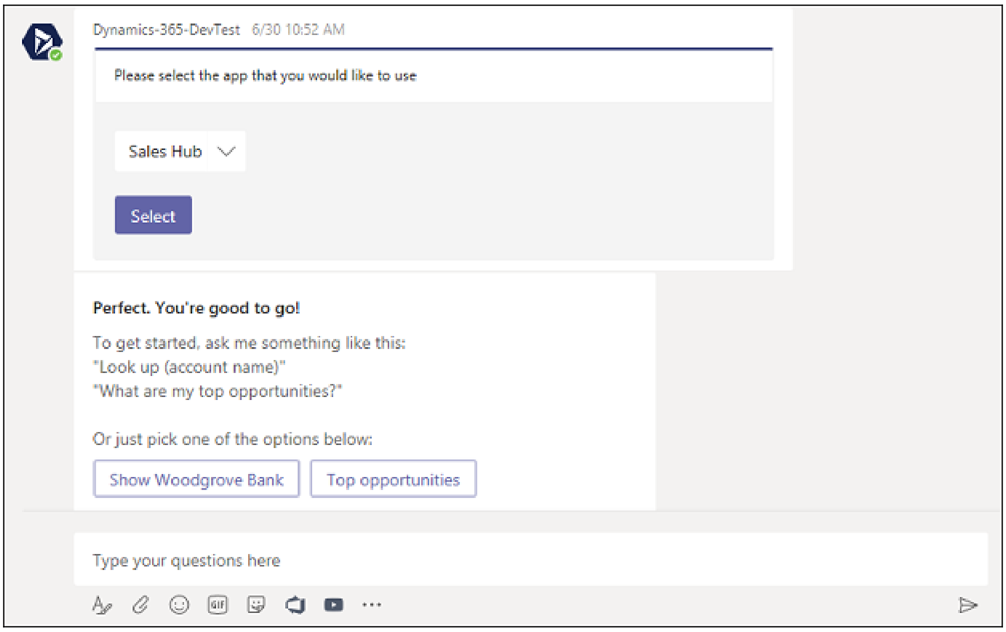



2. A Welcome message appears in the **Conversation** tab page. Select **Sign in**.

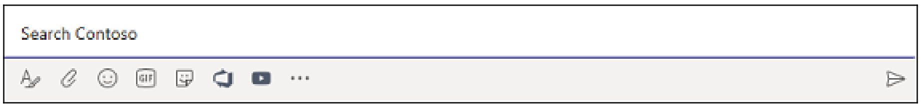



3. Select your organization, and then select **Next**.

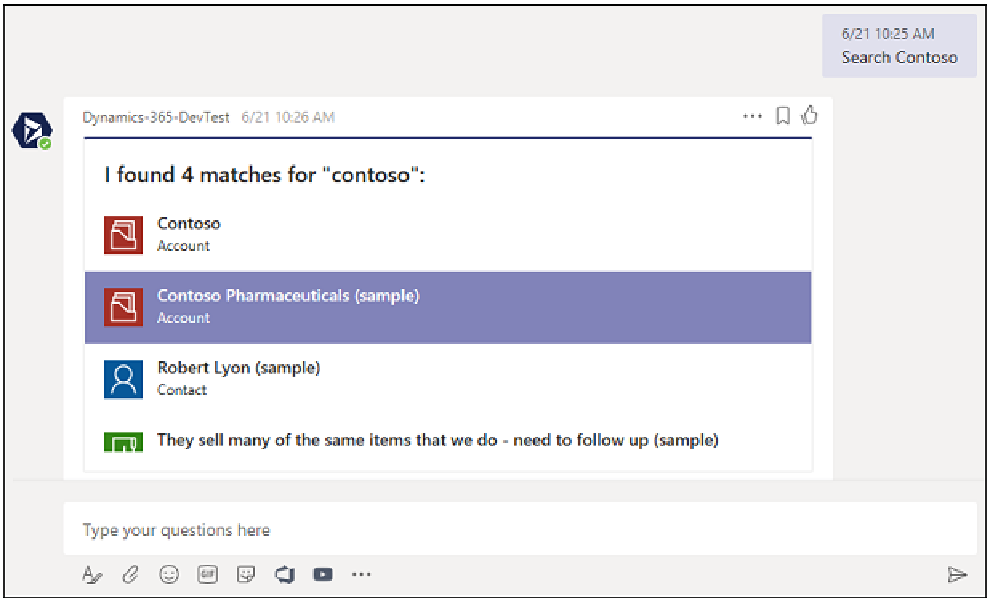
   Your bot is set up and ready for input.



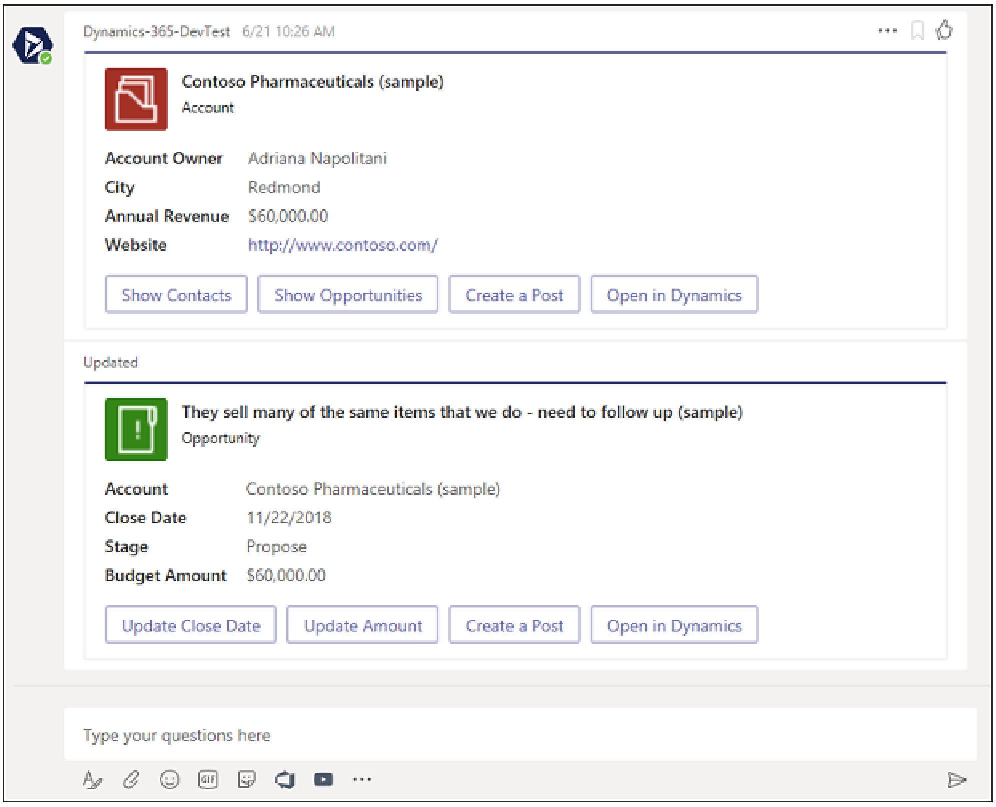

4. You can search to find records of interest. For example, enter "search contoso" in **Search** to see Contoso records.




5. Search returns a list of related Dynamics 365 records. Select a record to see details.



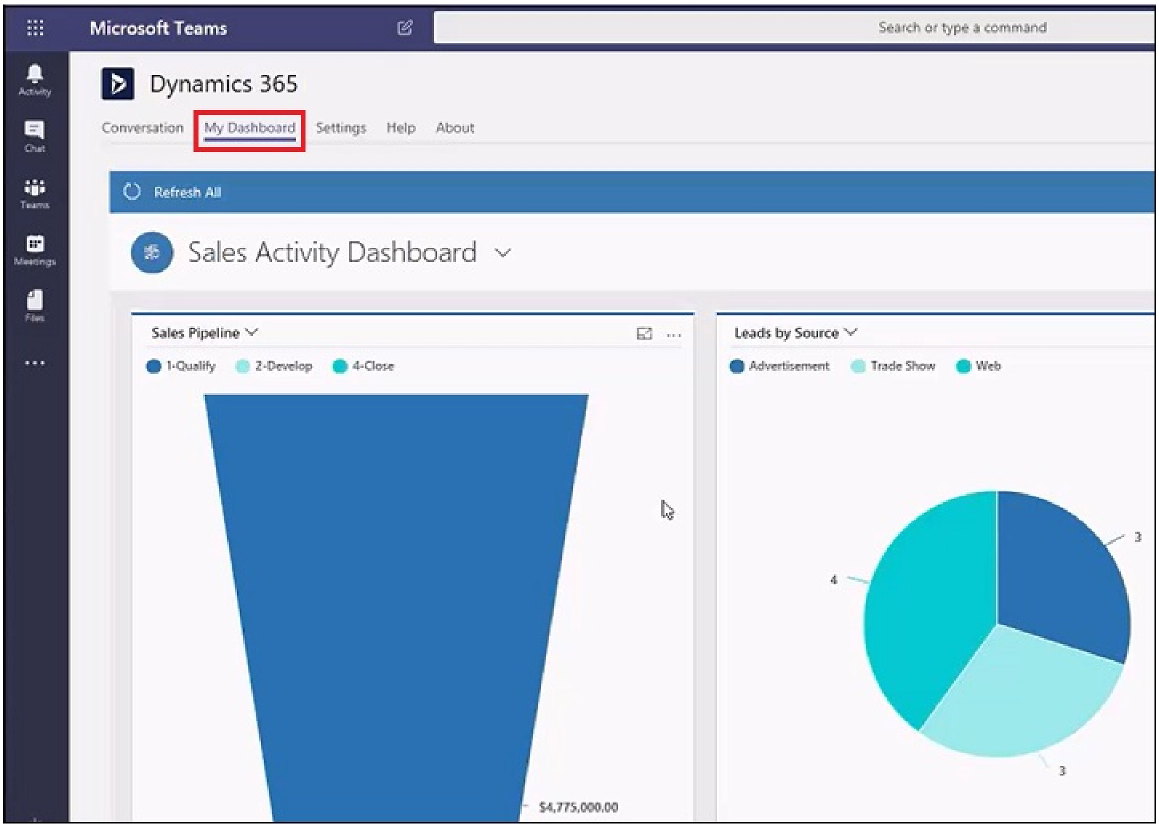

6. The details of the selected record are displayed in the personal app bot. You can select an activity to view and edit related record details. For example, select **Show Opportunities** to see opportunities for the Contoso account.



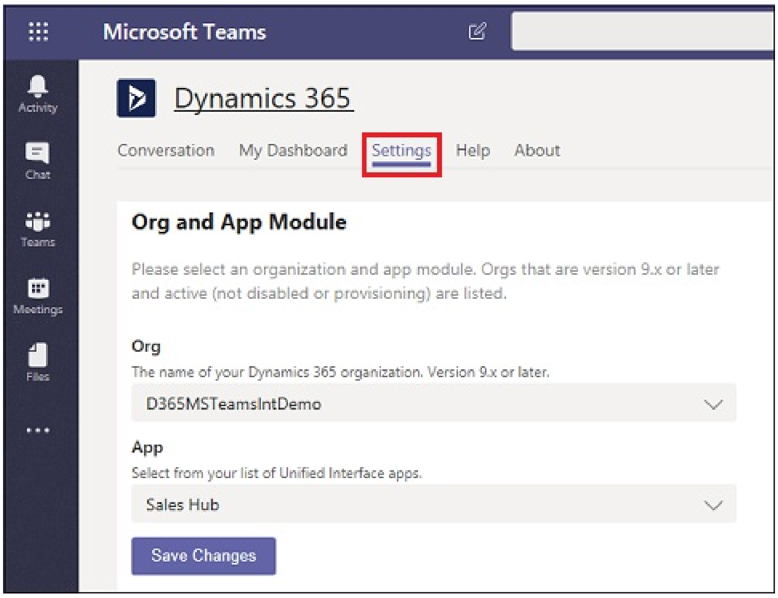

You can update the details of the records in the personal bot.

# Use the personal dashboard

Select **My Dashboard** to view your Dynamics 365 dashboard in Microsoft Teams. The dashboard displayed is based on who is signed in and their user role.




If you have more than one organization or Unified Interface app, you can use the **Settings** tab to select a different organization or app to appear as a dashboard.




**NOTE**

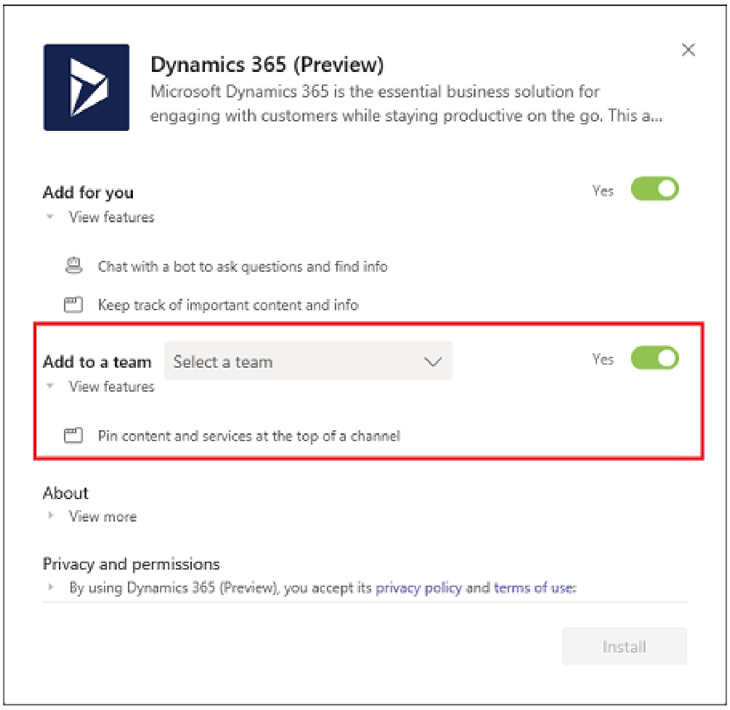
- Only Dynamics 365 version 9.x or later organizations appear in the list. Also, only active organizations (those that are not disabled or provisioning) are displayed.
- Only Unified Interface apps are listed.
- Only app modules licensed for the selected organization are listed.

## Install the Team app

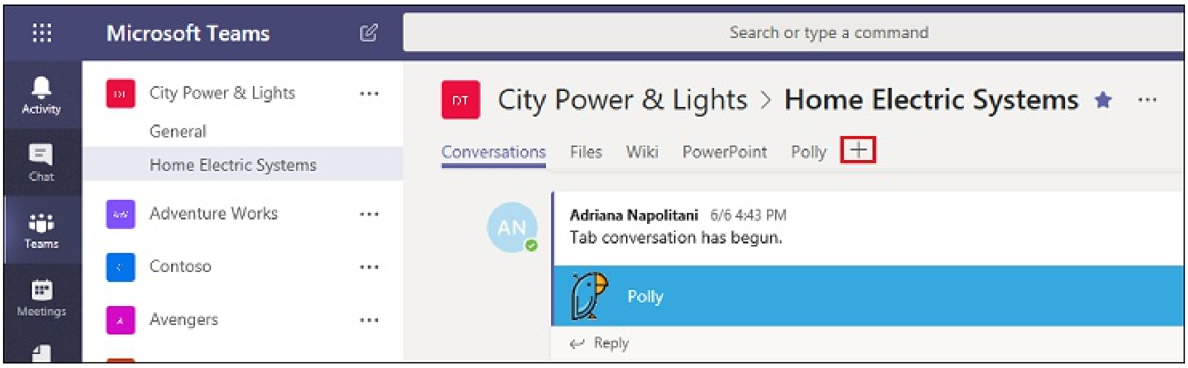
You can also install the Team app which integrates Dynamics 365 and Teams to use with your team members. These steps are for installing the Team app - the settings under **Add to a team**.

Once you've selected the Dynamics 365 app (see Select the app in the app Store), the settings page opens.

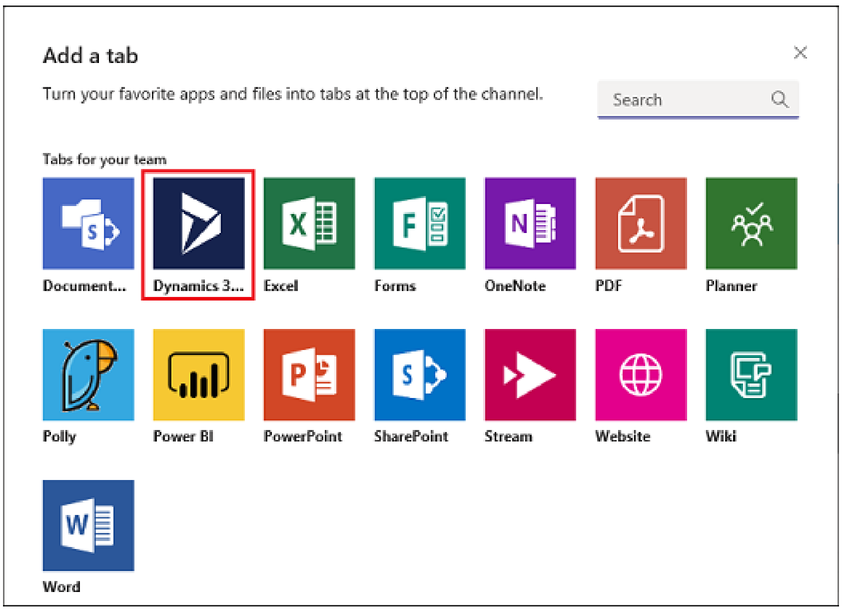
1. Choose a Team, verify **Yes** is enabled, and then select **Install** to install the Team app.



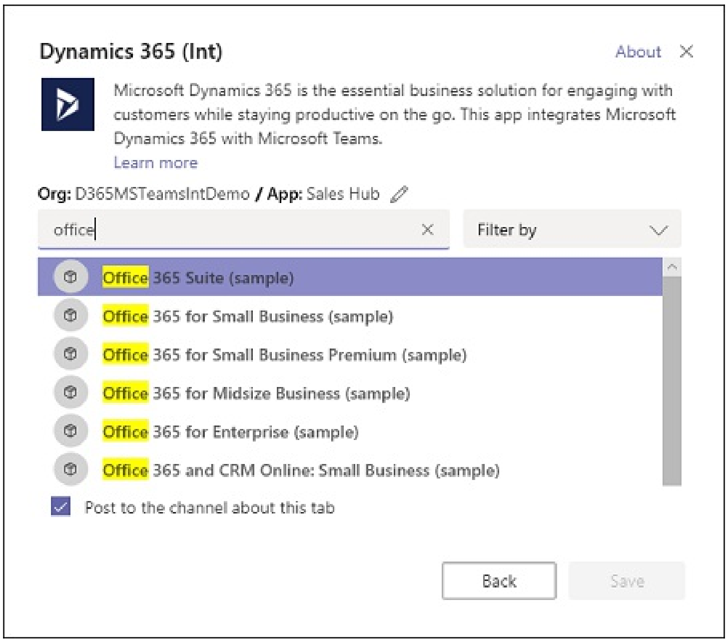

2. With the Team app installed, select the **Add** button (+) to add the Dynamics 365 tab to a Microsoft Team channel.



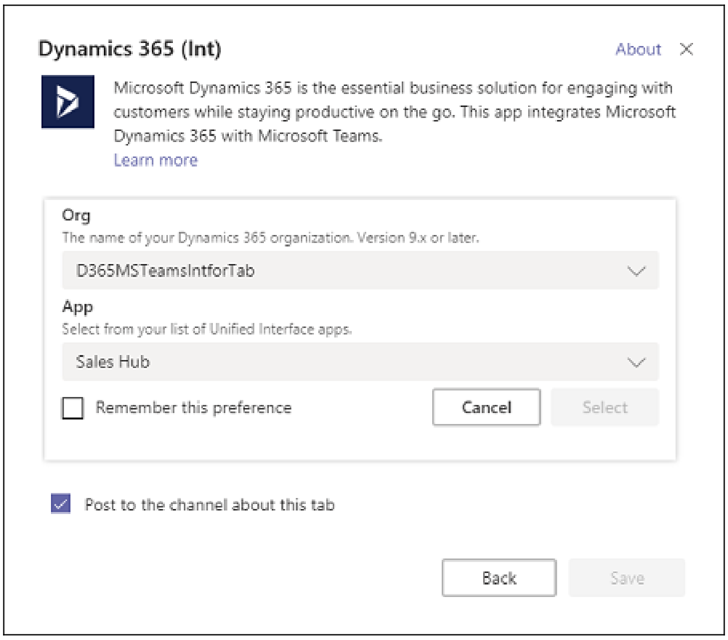

3. Select the **Dynamics 365** icon to pin a Dynamics 365 record to a Microsoft Team discussion channel.




4. Search for an entity to pin. Use **Filter by** to narrow the search to an entity type. Select **Save**.



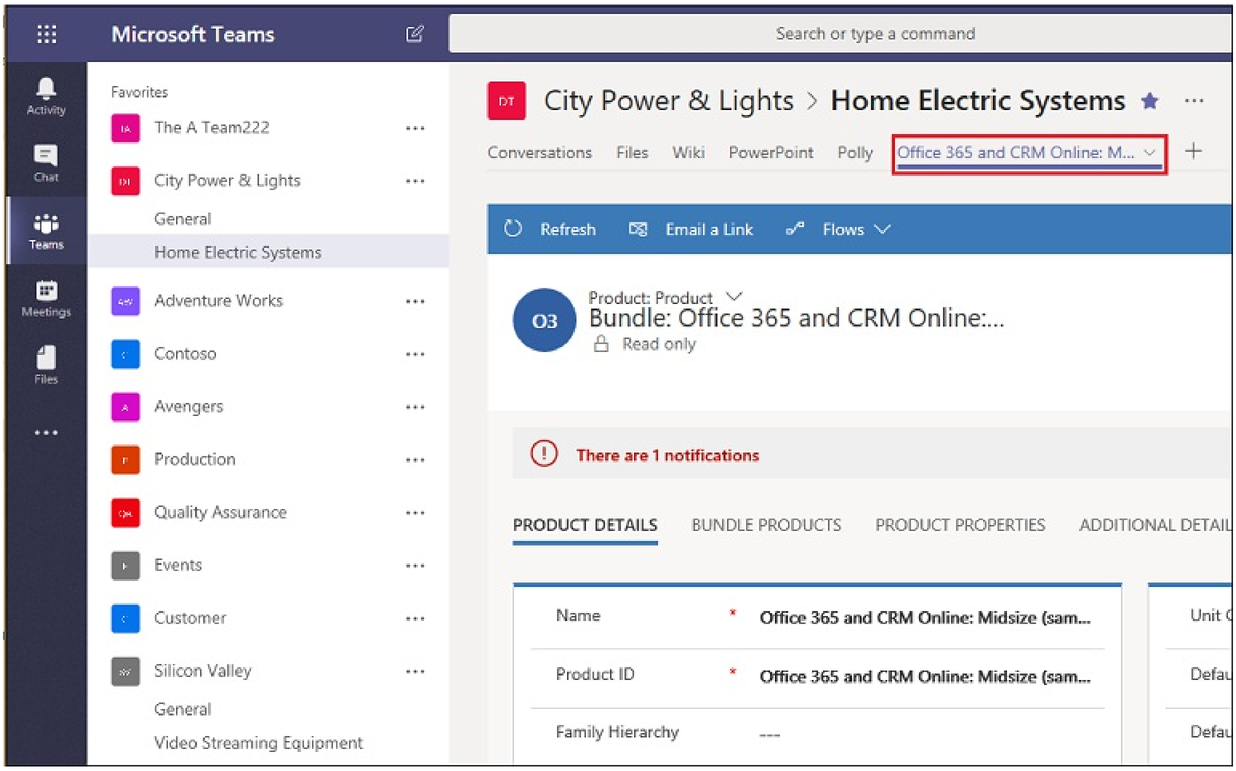

If you have multiple organizations or app modules, select **Edit** (✎) to specify which records to pin to the discussion channel.




Enable **Remember this preference** to set the org and app selections to be the default personal dashboard that appears when you select **My Dashboard**.

Use the **Settings** tab to change these settings any time.

Once you complete the above steps, the Dynamics 365 tab appears on the menu bar.




You can interact with the record as if you were using the Dynamics 365 web app. Those with Write permissions can edit the record; changes will be synchronized with the Dynamics 365 web app.

## Delete user data

Your privacy is important to us! You can remove Dynamics 365 app personal data from Microsoft Teams.

The following data is stored with Dynamics 365 integration with Microsoft Teams.

| DATA | DESCRIPTION | DATA CLASSIFICATION | EXAMPLE |
|---|---|---|---|
| User ID | The user's Azure Active Directory object ID | EndUsePseudonymousIdentifiers (EUPI) An identifier created by Microsoft tied to the user of a Microsoft service. When EUPI is combined with other information, such as a mapping table, it identifies the end user. EUPI does not contain information uploaded or created by the customer. | • User GUIDs, PUIDs, or SIDs<br>• Session IDs |
| Tenant ID | The Azure Active Directory ID of user's tenant | OrganizationIdentifiableInformation (OII) Data that can be used to identify a tenant, generally config or usage data. This data is not linkable to a user and does not contain Customer content. | • Tenant ID (non-GUID)<br>• Domain name in e-mail address (xxx@contoso.com) or other tenant-specific domain information |

| DATA | DESCRIPTION | DATA CLASSIFICATION | EXAMPLE |
|---|---|---|---|
| Org URL | The URL of the Dynamics 365 org | OrganizationIdentifiableInformation<br>(OII) Data that can be used to identify a tenant, generally config or usage data. This data is not linkable to a user and does not contain Customer content. | • Tenant ID (non-GUID)<br>• Domain name in e-mail address (xxx@contoso.com) or other tenant-specific domain information |
| App module ID | The ID of app module selected to show in the dashboard | EndUsePseudonymousIdentifiers<br>(EUPI) An identifier created by Microsoft tied to the user of a Microsoft service. When EUPI is combined with other information, such as a mapping table, it identifies the end user. EUPI does not contain information uploaded or created by the customer. | • User GUIDs, PUIDs, or SIDs<br>• Session IDs |

You can contact support to request data deletion. Run the following Windows PowerShell commands to gather the information needed by Dynamics 365 support.

| COMMAND | COMMENT |
|---|---|
| `Connect-MsolService` | Enter your credentials in the popup window |
| `(Get-MsolUser -UserPrincipalName "<user email>").ObjectId` | Replace with the user's email |
| `(Get-MsolCompanyInformation).ObjectId` | |

Record this information to provide to Dynamics 365 support.

# Privacy notice

While using the Dynamics 365 for Sales bot in Microsoft Teams, the user's text inputs are analyzed for understanding the underlying query/intent. The user's input such as "Search account Contoso" is routed to one of Microsoft's Cognitive Service called Language Understanding Intelligent Service (LUIS). Read more about LUIS here. The LUIS service disambiguates or understands the intent of user input (in this case, the intent is to find information) and the target entity (in this case, the intended entity is an account named Contoso). This information is then passed on to Microsoft's Azure bot framework which interacts with Dynamics data and retrieves the desired information for the user query.

By installing and allowing access to use of the bot, you agree to allow the LUIS service and Azure Bot framework to process the intent behind the input – which results in an enhanced conversational user experience. The LUIS service and Azure bot framework may have varying levels of compliance compared to Dynamics 365 for Sales. While the LUIS service has access to only the user queries and is not designed to be connected to the user's Dynamics data or account, a user of the Dynamics 365 for Sales bot could voluntarily enter a query containing Customer Data, Personal Data or other data and such query content could get sent to the LUIS service and the

Azure bot framework.

The content of user’s queries and messages is retained in LUIS system for a maximum of 30 days, encrypted at rest and is not used for training or service improvement. Read more about Cognitive Services here.

To manage admin settings for apps in Teams, go to the Office 365 admin center and open **Settings** > **Services & add-ins**, then choose Microsoft Teams. If you're signed in as an Office 365 admin, you can access these controls here, including the ability to uninstall.

**See also**

Download and install Microsoft Teams

# Skype for Business and Skype integration

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

If your organization uses Skype for Business (formerly known as Lync) or Skype, you can take advantage of connectivity features like click-to-call or checking user availability from within Dynamics 365 or Microsoft Dynamics 365 for Outlook.

## Using Skype for Business with Dynamics 365

When you use Skype for Business and Dynamics 365 together, you can use Skype for Business) presence and click-to-call from within Dynamics 365.

Your organization must have one of the following products or subscriptions:

- Skype for Business
- Skype for Business Server 2015
- Lync Server 2013
- Lync Server 2010

  **Client requirements and Dynamics 365 configuration**

- To use click-to-call, Skype for Business must be selected as the telephony provider in Dynamics 365. You can set this on the General tab at Settings > Administration > System Settings.
- By default, Skype for Business presence is enabled in Dynamics 365. System administrators can enable or disable presence in Dynamics 365. To do this, click **Settings** > **Administration** > **System Settings** and on the **General** tab, **Set the IM presence option** to **Yes** or **No**.
- Each user must have the Skype for Business client installed and running on their PC.
- For Skype for Business presence, Dynamics 365 (online) users must have `https://*.dynamics.com` added to their web browsers trusted sites list in Internet options in Internet Explorer.

**Supported devices and web browsers when you use Skype for Business with Microsoft Dynamics 365**

| MOBILE APP OR WEB BROWSER | SKYPE FOR BUSINESS CLICK-TO-CALL | SKYPE FOR BUSINESS PRESENCE |
|---|---|---|
| Dynamics 365 for iPad | Yes | No |
| Dynamics 365 for Android | Yes | No |
| Windows-based tablets | Yes | No |
| Internet Explorer | Yes | Yes |
| Google Chrome | Yes | No |
| Mozilla Firefox | Yes | No |

| MOBILE APP OR WEB BROWSER | SKYPE FOR BUSINESS CLICK-TO-CALL | SKYPE FOR BUSINESS PRESENCE |
|---|---|---|
| Apple Safari | Yes | No |

# Using Skype with Dynamics 365

When you use Skype and Dynamics 365 together, you can use Skype click-to-call from within Dynamics 365.

**Client requirements and Dynamics 365 configuration**

- Each user must have the Skype for Windows desktop client or the Skype for Windows 8 app installed and running on their PC or Windows 8 device.
- **Skype** must be selected as the telephony provider in Dynamics 365. You can set this on the **General** tab at **Settings** > **Administration** > **System Settings**.

**Supported devices and web browsers when you use Skype with Dynamics 365**

| MOBILE APP OR WEB BROWSER | SKYPE CLICK-TO-CALL |
|---|---|
| Dynamics 365 for iPad | Yes |
| Dynamics 365 for Android on Android tablets | Yes |
| Windows-based tablets | Yes |
| Internet Explorer | Yes |
| Google Chrome | Yes* |
| Mozilla Firefox | Yes** |
| Apple Safari | Yes |

* The Skype Click-to-call plugin must be installed on the Chrome browser and enabled. More information: How do I enable Skype Click to Call in Chrome?

Additionally, Skype click-to-call is supported with Dynamics 365 for Windows 8, Dynamics 365 for Windows 8.1, and Windows 10.

**See also**

Set up Dynamics 365 (online) to use Skype or Skype for Business
Microsoft Dynamics 365 (online) requirements

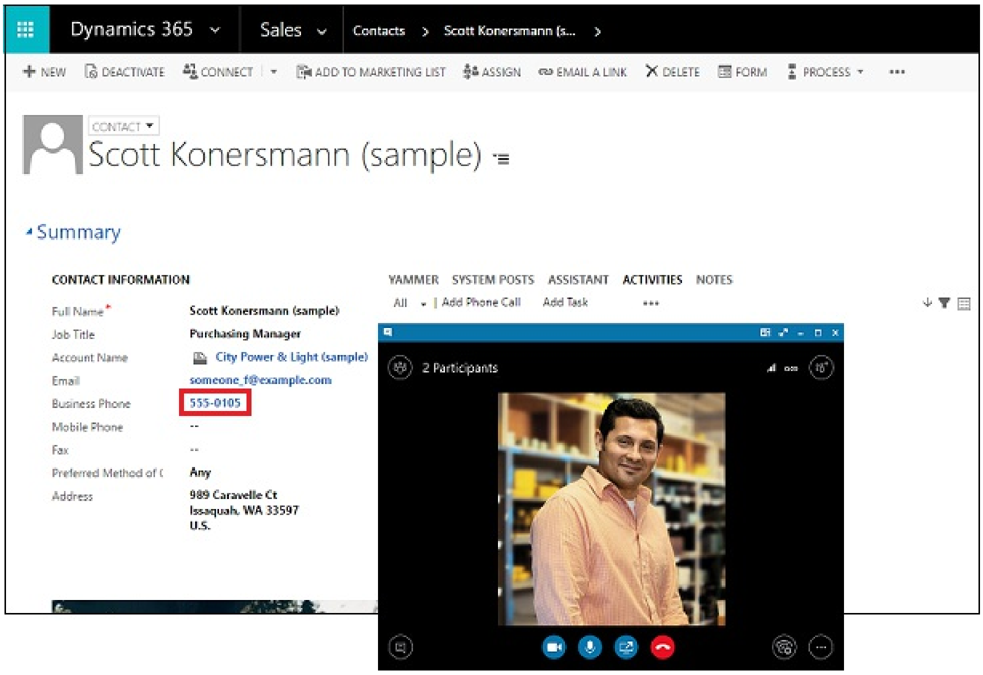
# Set up Dynamics 365 (online) to use Skype or Skype for Business

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

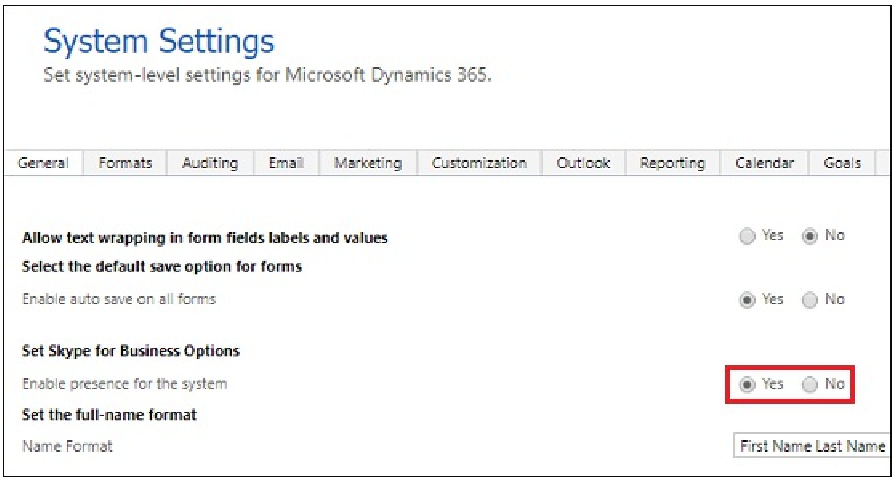
When you use Skype for Business and Dynamics 365 (online), your organization can benefit from these capabilities:

- Real-time communications with customers, colleagues, and team members without leaving Dynamics 365. Click or tap a person's phone number to call them.
- Track meetings as Activities in Dynamics 365.
- Get Presence information for members of the same email domain you are signed in with in Skype for Business.

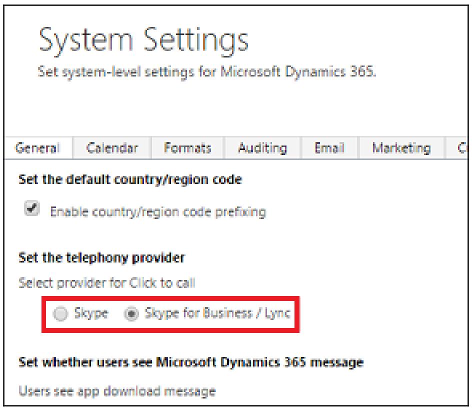



## Set up Skype in Microsoft Dynamics 365 (online)

1. Verify that IM presence is enabled in Dynamics 365. Go to **Settings** > **Administration** > **System Settings** > **General tab**.



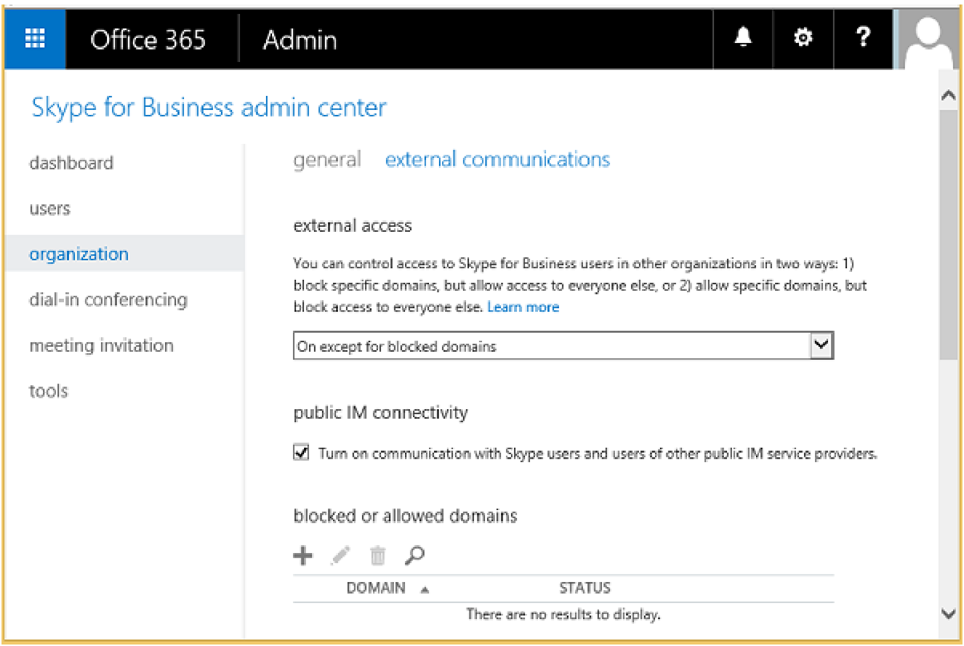

2. In **System Settings**, set the telephony provider to Skype for Business.




3. Browse to the Office 365 admin center and sign in using Office 365 Global 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.

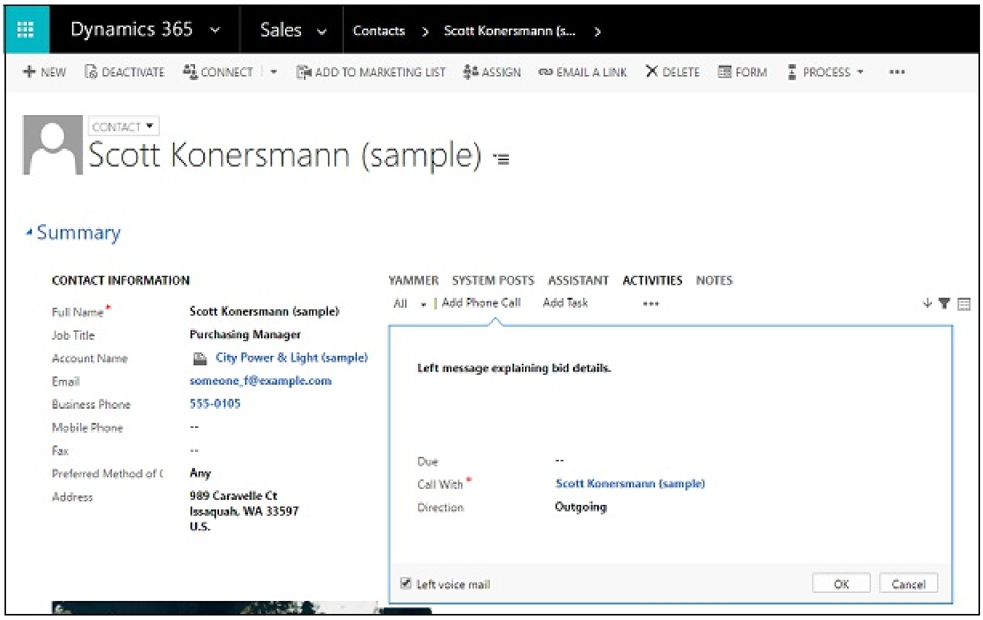
> **NOTE**
>
> Presence information is shown for members of the same email domain you are signed in to with Skype for Business. For example, if you are signed in with someone@contoso.com, you will see presence for other @contoso.com users.
>
> Instruct users to add the following as trusted sites in their 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

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




### See also

[Skype for Business and Skype integration with Microsoft Dynamics 365]

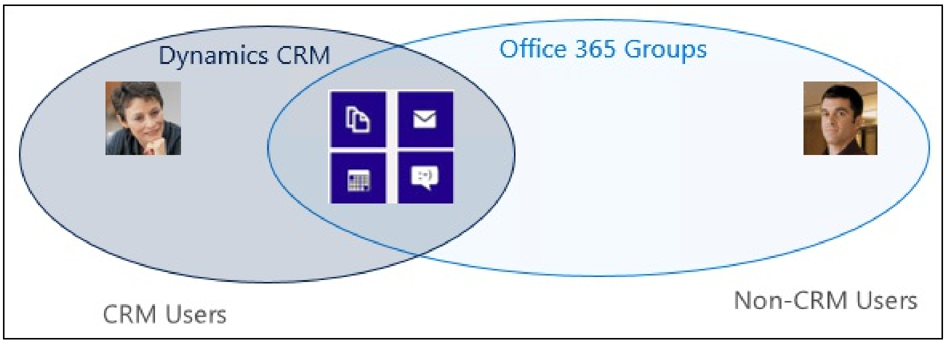
[Skype for Business help]

# Deploy Office 365 Groups

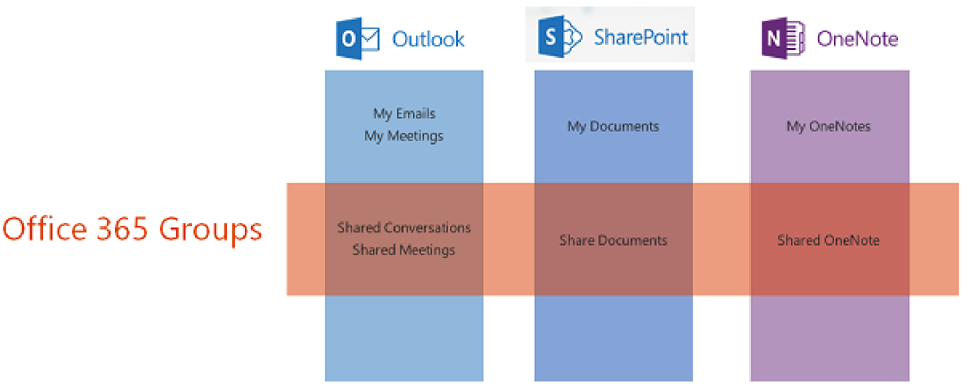
8/24/2018 • 6 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Office 365 Groups, available with Dynamics 365 (online), provides a new environment for collaboration with Office 365 users who don't use Dynamics 365. 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 Dynamics 365. Office 365 Groups provides a single location to share documents, conversations, meetings, and notes. You can enable Office 365 Groups for any entity.




Collaborate with people inside and outside of your Dynamics 365 organization.




Share information in multiple ways.

> **TIP**
>
> Check out the following for a quick introduction to Office 365 Groups:
>
> - Video: Introducing Groups in Office 365.
> - Learn more about groups

## Requirements

The following are required to use Office 365 Groups with Dynamics 365:

- Dynamics 365 (online)
- This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate

to Dynamics 365 (online)?

- For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:
  - Dynamics 365 pricing
  - Dynamics 365 Licensing Guide
- Exchange Online
- To use document storage with Office 365 Groups, you will need SharePoint Online and access to the group OneNote notebook.

## Provision Office 365 Groups

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

> **NOTE**
> Users must have an Exchange Online mailbox set up to use Office 365 Groups. Exchange Online is already properly configured for Dynamics 365 (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 to SharePoint Online. Server-based SharePoint integration is also required to enable the group OneNote notebook.
>
> More information: Configure server-based authentication with Dynamics 365 (online) and SharePoint Online

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
2. Click **Admin centers** > **Dynamics 365**.
3. Click the **Instances** tab.
4. Choose your instance, and then click **Solutions**.
5. Select **Office 365 Groups** and then click **Install**.
6. Review the terms of service and then click **Install**.

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

> **NOTE**
> When you install a solution, your Dynamics 365 (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**.
2. Click **Security Roles**.
3. Choose the security role to check and then click 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. Click **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 Dynamics 365 (online).

1. In Dynamics 365 (online), click **Settings** > **Office 365 Groups**.

2. On the **Office 365 Groups Settings** page, click **+Add entity** and choose an entity from the drop-down list. Repeat this step for each entity you want to enable, including custom entities.

3. Optionally, you can click **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, click **Publish All**.

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

   You're now ready to use Office 365 Groups. See Collaborate with your colleagues using Office 365 Groups.

## Use the Office 365 Connectors for Groups

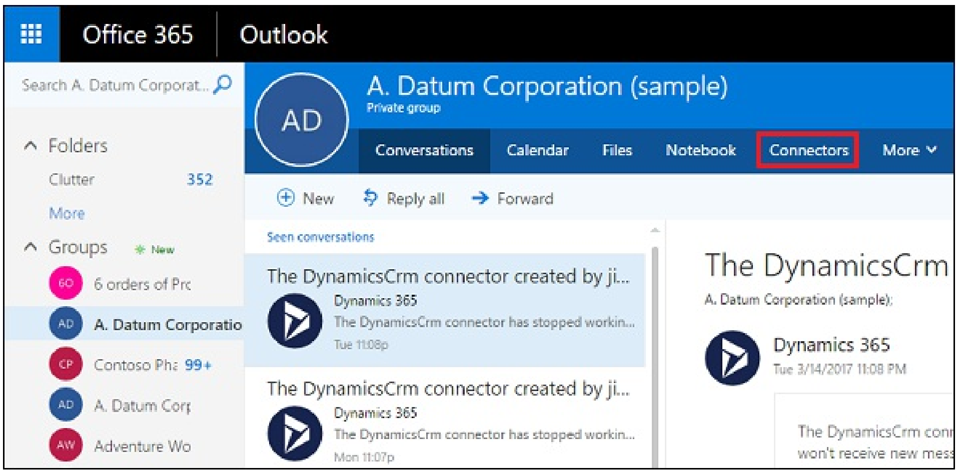
Use the Office 365 Connectors for Groups to connect new or existing Office 365 Groups with Dynamics 365 (online) so the group is notified when new activities are posted. To set it up, follow these steps:

> **TIP**
> Check out the following Dynamics 365 Blog: Dynamics CRM Online connector for Office 365 Groups

1. Sign in to your Office 365 Outlook.

2. Create or choose an Office 365 Group.

3. Click **Connectors**.

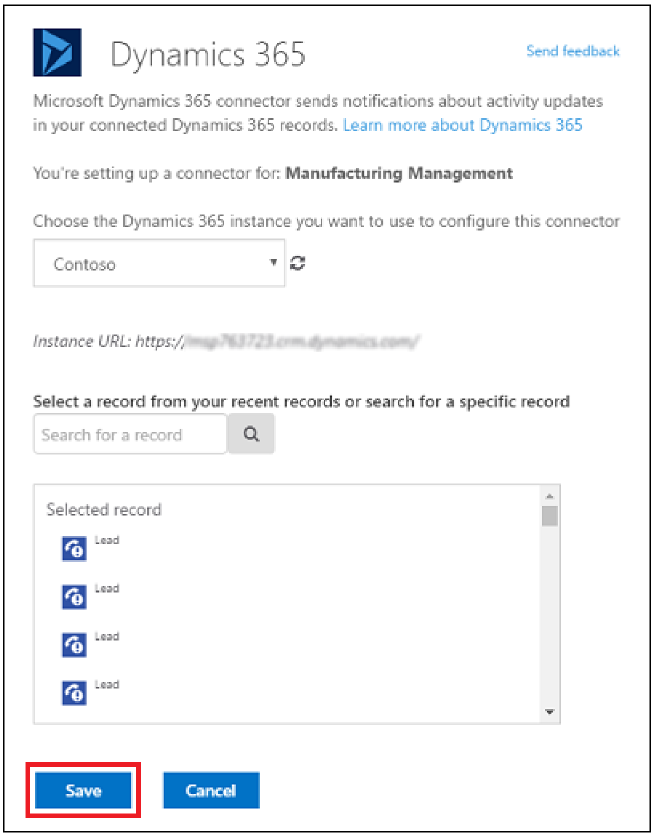



4. Scroll down to **Dynamics 365 Online**, and then click **Add**.

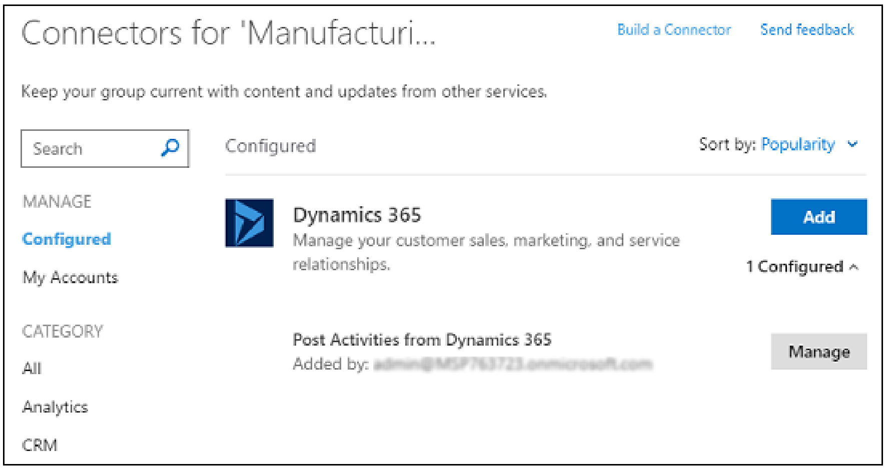
5. If you have access to more than one Dynamics 365 (online) instance, choose which instance to connect to this Office 365 Group. If you only have access to one Dynamics 365 (online) instance, this step will be

skipped and you will advance to the next step.

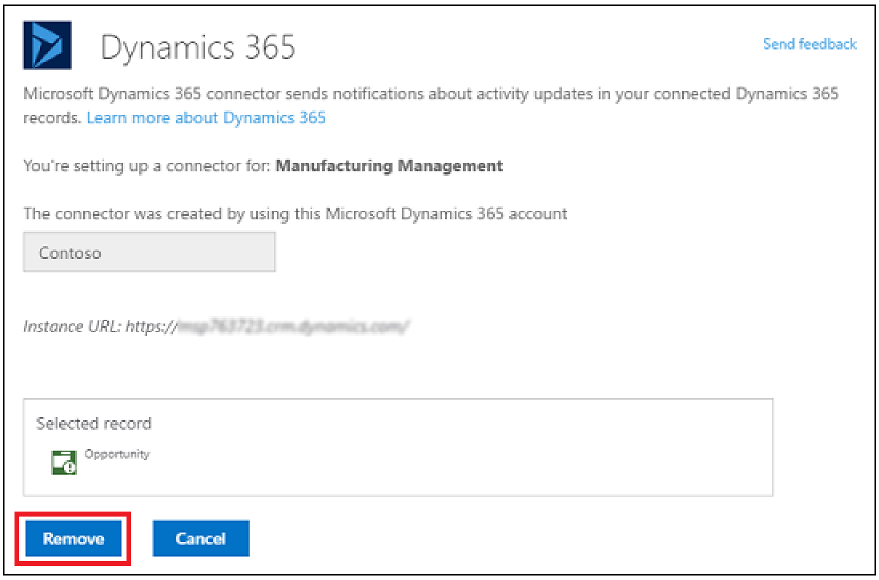
6. Choose the Dynamics 365 record you want to connect this Office 365 Group to, and then click **Save**.




Once connected, the Dynamics 365 (online) connector shows up at the top of the connection list with a summary of connected records.




To delete a connected record, click **View**, and then click **Remove**.




**NOTE**

Note the following about the Office 365 Connectors for Groups:

- Only account, lead, and opportunity records are supported.
- You can connect up to five records.
- Only task type activities are sent to the group as connector cards.
- The activity appears as a new conversation in a card format in the Group.
- The fields in the card shown in the Group conversation are not customizable.
- Nothing is required in Dynamics 365 to make the connector work.
- For sensitive information, you should connect your Dynamics 365 record to a private group where only approved members can view contents. For public groups, everyone in the org has access to view contents. See "Public and private Office 365 groups" in Learn more about groups.

## Known issues

You need to have Dynamics 365 (online) version CRM Online 2015 Update 1 or later, to install Office 365 Groups. If Office 365 Groups appears as an available solution in the Dynamics 365 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 Dynamics 365 (online) before you can install Office 365 Groups.

## Privacy notice

When a user leverages the Office 365 Groups for Dynamics 365 feature to connect an Office Group to Microsoft Dynamics 365 (online), data (including new conversations and documents) will be stored on the Exchange and/or SharePoint system and shared with the members of that Office Group, even if they are not licensed or authorized Dynamics 365 users. Users will only be able to share the data that they have access to, and Administrators can limit the data that is shared by limiting the access privileges of their users.

### See also

Collaborate with your colleagues using Office 365 Groups
CRM Blog: Dynamics CRM Online connector for Office 365 Groups
Set up Dynamics 365 (online) to use Exchange Online
Blog: It's here - Office 365 Groups in CRM Online
Office 365 Groups in Dynamics 365 FAQs

# Set up OneNote integration

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Gather your thoughts, ideas, plans and research in one single place with OneNote in Dynamics 365.

When you turn on OneNote integration in Dynamics 365 (online), you have the benefits of using OneNote to take or review customer notes from within your Dynamics 365 records.

You can configure OneNote in Dynamics 365 (online) when you're also using SharePoint Online. You must have a subscription to Office 365 to use OneNote in Dynamics 365 (online).

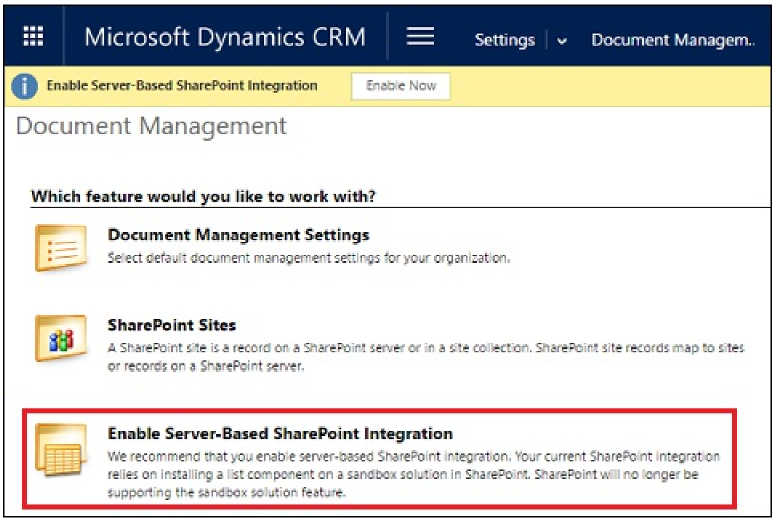
## Step 1: Turn on server-based SharePoint integration

Before you can enable OneNote integration, you need to turn on server-based SharePoint integration.

Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365. Or, make sure that you have Read and Write privileges on all record types that are customizable.

**Check your security role**

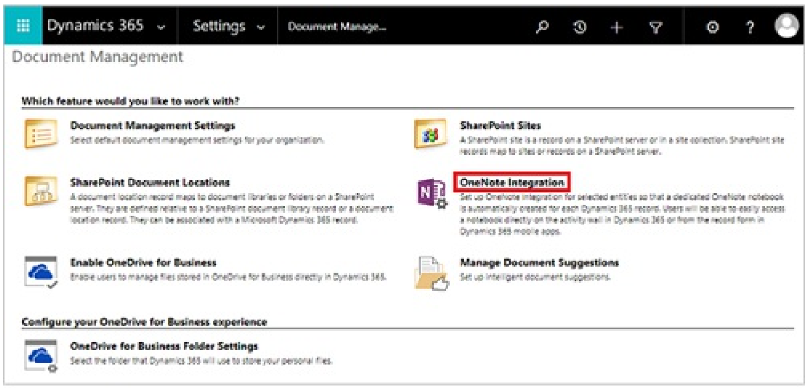
- Follow the steps in View your user profile.
- Don't have the correct permissions? Contact your system administrator.



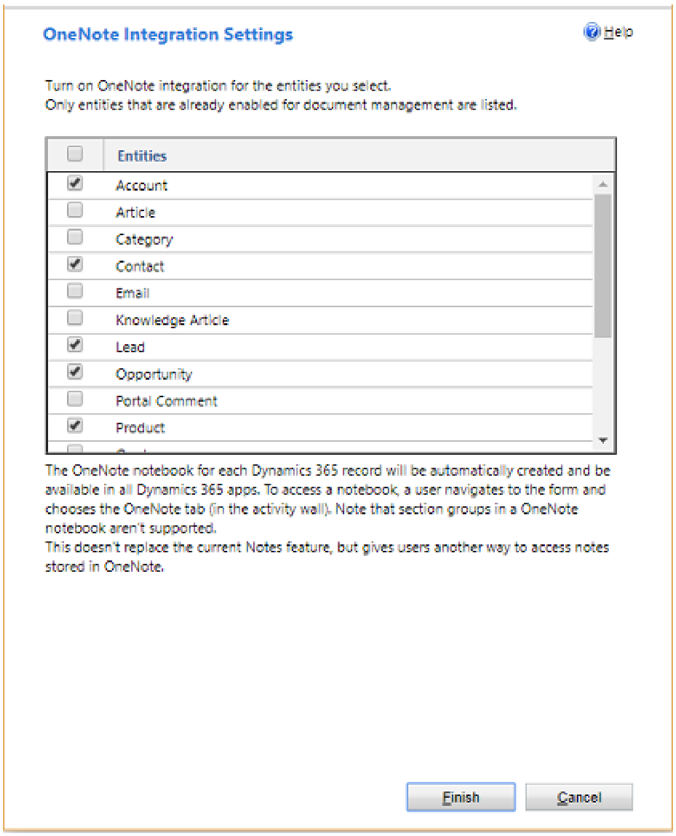

## Step 2: Turn on OneNote integration

When server-based SharePoint integration is turned on, **OneNote integration** is listed in **Document Management**.

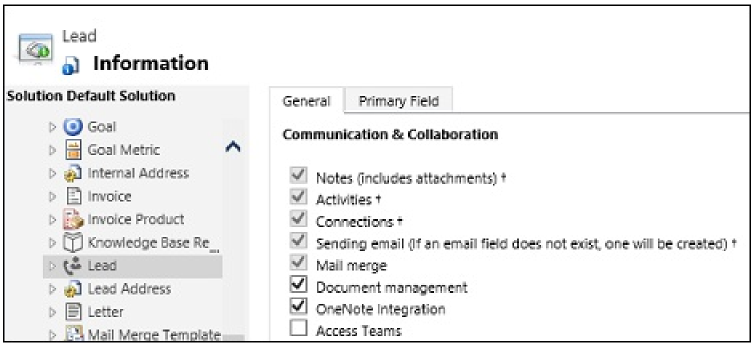
1. Go to **Settings** > **Document Management**.
2. Select **OneNote Integration**.




3. Follow the instructions in the wizard to turn on OneNote integration for selected entities. Choose entities that need a full notebook per record. Only entities that are already enabled for document management are listed. Select **Finish**.




4. You can also enable OneNote integration for an entity from the customization form, as long as document management has been enabled for that entity.



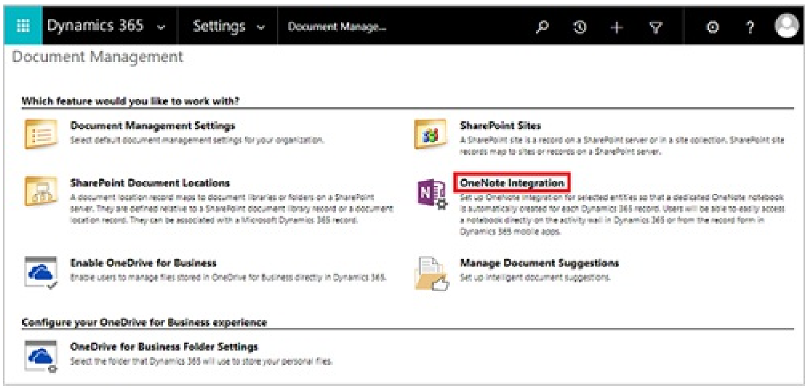

5. A OneNote notebook is automatically created for a record the first time you select the **OneNote** tab in the activities area in Dynamics 365 (online). After the dedicated OneNote notebook is created for that Dynamics 365 record, you can view and navigate to that notebook from any Dynamics 365 client.

More information: Use OneNote in Dynamics 365 (online)

# To turn off OneNote integration

1. Go to **Settings** > **Document Management**.

2. Select **OneNote Integration**.




3. In the **OneNote Integration Setting** dialog box, clear the check boxes for all entities, and then select **Finish**.

### See also

[Use OneNote in Dynamics 365 (online)]
[OneNote in Dynamics 365 FAQs]
[Turn on server-based SharePoint integration]
[Blog: OneNote in CRM]

# Enable OneDrive for Business (online)

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This feature was introduced in CRM Online 2016 Update.

Users can create and manage private documents with OneDrive for Business. Those documents can be accessed in Dynamics 365 (online) after the system administrator has enabled OneDrive for Business.

## Requirements

> **NOTE**
> This topic applies to organizations deploying online versions of OneDrive for Business and Dynamics 365. For information on integrating OneDrive for Business on-premises with Dynamics 365, or an online/on-premises mix of these products, see: Enable OneDrive for Business (on-premises).

The following are required to use OneDrive for Business with Dynamics 365 (online):

- Configure server-based authentication with Dynamics 365 (online) and SharePoint Online.
- A OneDrive for Business license for each user. More information: What is OneDrive for Business?
- A SharePoint license for each user. Users with a SharePoint license can use OneDrive for Business. For SharePoint Online, Office 365 subscriptions come with SharePoint Online licenses.
- For full Office 365 feature integration with Dynamics 365 (online) and Dynamics 365 (on-premises), you'll need Office 365 Enterprise E3 or later. Skype for Business PSTN calling and conferencing requires Office 365 Enterprise E5. Other Office 365 plans are not supported. For more information on licensing and pricing, see:
  - Dynamics 365 pricing
  - Dynamics 365 Licensing Guide
- Before using OneDrive for Business in Dynamics 365, the Dynamics 365 administrator and end users should access OneDrive for Business through the web interface. For example, if you're using SharePoint Online, go to **https://portal.office.com** > **app launcher** > **OneDrive**. The site and other information required by Dynamics 365 to enable OneDrive for Business integration gets created only when the site is accessed.

## Enable OneDrive for Business

You can enable OneDrive for Business as follows.

1. Click **Settings** > **Document Management** > **Enable OneDrive for Business**.
2. Click **Enable OneDrive for Business** to enable it, and then choose **OK**.

## Controlling access to OneDrive for Business in Dynamics 365

You can toggle availability of OneDrive in Dynamics 365 for end users through the **OneDrive for Business** privilege.

1. Click **Settings** > **Security** > **Security Roles**.

2. Select a security role, and then click the **Core Records** tab.

3. Under **Miscellaneous Privileges**, toggle the **OneDrive for Business** privilege to the desired availability.


### See also

[Enable OneDrive for Business (on-premises)]
[What is OneDrive for Business?]

# Enable OneDrive for Business (on-premises)

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Users can create and manage private documents with OneDrive for Business. Those documents can be accessed within Dynamics 365 after the system administrator has enabled OneDrive for Business.

## Requirements

The following are required to use OneDrive for Business with Dynamics 365 Server.

> **NOTE**
> This topic applies to organizations deploying on-premises versions of OneDrive for Business and Dynamics 365 or an online/on-premises mix of these products. For information on integrating OneDrive for Business online with Dynamics 365 (online), see: Enable OneDrive for Business.

- Set up SharePoint integration with Microsoft Dynamics 365 and have at least one team site.
- Set up permission on the root SharePoint team site for all users who will use OneDrive for Business in Dynamics 365. More information: Plan sites and manage users
- For SharePoint on-premises, enable the Search service to access shared documents from other users. It is enabled by default on SharePoint Online but not on SharePoint on-premises. More information: Create and configure a Search service application in SharePoint Server 2013

## Enable OneDrive for Business

You enable OneDrive for Business as follows:

1. Click **Settings** > **Document Management** > **Enable OneDrive for Business**
2. Click **Enable OneDrive for Business** to enable it, and then click **OK**.

   **If you're running SharePoint Server on-premises**, on the Windows Server where SharePoint Server is running, open the SharePoint Management Shell and run the following commands to set up permissions between SharePoint and Dynamics 365 Server.

> **NOTE**
> You might have already set up permissions and can skip the following if you completed the steps in Configure server-based authentication with Dynamics 365 Online and SharePoint on-premises.

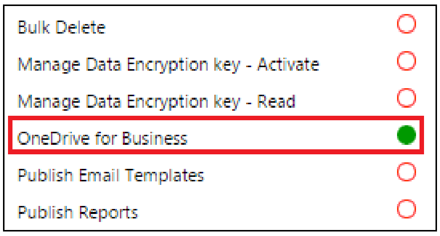
```
Add-Pssnapin *
# Access WellKnown App principal
[Microsoft.SharePoint.Administration.SPWebService]::ContentService.WellKnownAppPrincipals

# Create WellKnown App principal
$ClientId = "00000007-0000-0000-c000-000000000000"
$PermissionXml = "<AppPermissionRequests AllowAppOnlyPolicy=""true""><AppPermissionRequest
Scope=""http://sharepoint/content/tenant"" Right=""FullControl"" /><AppPermissionRequest
Scope=""http://sharepoint/social/tenant"" Right=""Read"" /><AppPermissionRequest
Scope=""http://sharepoint/search"" Right=""QueryAsUserIgnoreAppPrincipal"" /></AppPermissionRequests>"

$wellKnownApp= New-Object -TypeName "Microsoft.SharePoint.Administration.SPWellKnownAppPrincipal" -
ArgumentList ($ClientId, $PermissionXml)

$wellKnownApp.Update()
```

## Controlling access to OneDrive for Business in Dynamics 365

You can toggle availability of OneDrive in Dynamics 365 for end users through the **OneDrive for Business** privilege.

1. Click **Settings** > **Security** > **Security Roles**
2. Choose a security role, and then click the **Core Records** tab.
3. Under **Miscellaneous Privileges**, toggle the **OneDrive for Business** privilege to the desired availability.

> **NOTE**
> This privilege is visible in the Security Roles dialog only after OneDrive for Business is enabled.




### See also

[Set up SharePoint integration with Microsoft Dynamics 365]
[Use OneDrive for Business to manage your private documents]
[What is OneDrive for Business?]
[SharePoint Online and OneDrive for Business: software boundaries and limits]

# About Office Delve/Graph

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Office Graph integration for Dynamics 365 Customer Engagement will be removed on August 31, 2017, at the same time that Office ends GQL query support. Customers can continue to use Office Graph integration through August 31, 2017. After August 31 that date, the Office Graph trending documents component will cease to function and you'll see the following error message:

**We can't get to the trending documents. Try again later.**

To disable Office Graph:

1. Go to **Settings** > **Document Management** > **Office Graph Integration**.
2. Remove the Trending Documents dashboard component from existing dashboards.

For more information, see the blog: Office Graph integration removal.

**See also**

View relevant and trending information on a dashboard with Office Delve

# Connect to Yammer

10/2/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Yammer gives colleagues at your organization a central place to have conversations, create and edit documents, and share information without sending a single email or attending any meetings.

After you set up your organization to work with Yammer, employees will see posts in a newsfeed on their Dynamics 365 dashboard whenever people update customer info, and they'll be able to join in the conversation with their own posts.

## Connect your organization to Yammer

**Prerequisites**

- Before your organization can use Yammer in Dynamics 365, your organization needs to buy Yammer enterprise licenses.
- Yammer integration is only available for Dynamics 365 (online).
- Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.
- You'll also need to have verified system administrator privileges for your organization's Yammer account.
- Install the most recent product updates for Dynamics 365.
- Meet browser and system requirements.

**Connect Dynamics 365 to Yammer**

1. Sign up for a Yammer Enterprise account, and note the name of the network you receive. More information: Visit the Yammer website
2. Go to **Settings** > **System**.
3. Choose **Administration** > **Yammer Configuration**
4. Read the disclaimer, and then choose **Continue**.
5. Choose **Authorize Dynamics 365 (online) (or Dynamics 365) to connect to Yammer**.
6. Sign in to your enterprise Yammer account using your administrator credentials.
7. Follow the on-screen instructions to accept the Yammer terms of service, note which Yammer network has been set up for you, and connect your organization to it. After your organization is connected, you'll see a confirmation message at the bottom of the screen.

   > **NOTE**
   >
   > Dynamics 365 only supports connecting to the primary Yammer network. Connecting to External Networks in Yammer is not supported.

8. If desired, stay signed in to your Yammer account and set your organization's preferences for Yammer posts.

**Set your organization's preferences for Yammer posts (optional)**

1. Make sure you're signed in to your enterprise Yammer account using your administrator credentials.
2. If desired, select whether Yammer posts are **public** (everyone sees Dynamics 365 posts in the newsfeed, or **private** (people must "follow" a record to see posts about that record in the newsfeed).
3. If desired, select the default group where you would like Dynamics 365 posts to appear.
4. If desired, select which record types trigger automatic posts to the Yammer newsfeed.

## Enable Dynamics 365 entities for Yammer

Once you've connected Dynamics 365 to Yammer, you need to specify which Dynamics 365 entities are enabled for use with Yammer. Enabled entities can be followed by users

1. Go to **Settings** > **System**.
2. Choose **Activity Feeds Configuration** > **Post Configurations**
3. Choose the entity, and then choose **Activate**.
4. Confirm the activation, and then choose **More Commands (...)** > **Publish All Customizations**

## What triggers automatic posts to the Yammer newsfeed?

The record types and rules in the following list can be enabled to trigger a Yammer post automatically. Record types that are enabled by default are marked "Yes." If you want to enable an entity or rule type, make sure that the entity or rule is activated and that the types of auto-posts you want are enabled.

| POST ENTITY ID | NAME | ENABLED TO POST AUTOMATICALLY |
|---|---|---|
| Case | New Case for an Account | Yes |
| Case | New Case for a Contact | Yes |
| Case | Case Closed for an Account | |
| Case | Case closed for a Contact | |
| Case | Case Assigned to User/Team | |
| Case | Case Routed to Queue | |
| Lead | New Lead created | |
| Lead | A Lead has been qualified | |
| Opportunity | New opportunity for an Account | Yes |
| Opportunity | New opportunity for a Contact | Yes |
| Opportunity | Probability for an Opportunity Updated for an account | |
| Opportunity | Probability for an Opportunity Updated for a contact | |

| POST ENTITY ID | NAME | ENABLED TO POST AUTOMATICALLY |
|---|---|---|
| Opportunity | Opportunity Won for an Account | Yes |
| Opportunity | Opportunity Won for a Contact | Yes |
| Opportunity | Opportunity Lost for an Account | |
| Opportunity | Opportunity Lost for a Contact | |
| Account | New Account Created | Yes |
| Contact | New Contact Created | |
| Competitor | New Competitor Created | Yes |

When you have Yammer set up, keep these things in mind:

- All user posts (conversations) are stored in Yammer, not in Dynamics 365.
- All system posts are stored in Dynamics 365.
- If the Post to Yammer Activity Stream rule (or posttoyammer attribute) is set to True in Post Rules Configuration, that activity will post to Yammer.

# Additional considerations

**When connecting Dynamics 365 with a federated Yammer**

If you have configured Yammer to use single sign-on, you'll need to generate and use a temporary password to connect Dynamics 365 to Yammer.

1. Sign in to Yammer with the single sign-on credentials.
2. Choose **More commands (...)** > **Apps**
3. Scroll to the bottom of the page to the **All Apps** section.
4. Choose the **Yammer** tab, and then choose an app like Windows Phone. The app must support generating a temporary password.
5. Complete the process to obtain a temporary user name and password.
6. Use the temporary user name and password to complete the Dynamics 365 to Yammer connection configuration.

**Add Yammer sites to the browser as trusted**

Add your Yammer sites to your browser as trusted. For example, for Dynamics 365 (online), add the following:

- https://*.crm.dynamics.com
- https://*.yammer.com
- https://*.assets-yammer.com

# Privacy notice

By enabling Yammer, you consent to share your data with an external system. Data that is imported from external systems into Microsoft Dynamics 365 (online) is subject to Microsoft Privacy and Cookies.

**See also**

Collaborate and communicate with Yammer

Visit the Yammer website

# Preview feature: Microsoft Cognitive Services integration

8/24/2018 • 8 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

This section describes how to integrate Microsoft Cognitive Services with Dynamics 365 (online) features, such as similar cases and suggest knowledge articles.

**IMPORTANT**

- Cognitive Services integration with Dynamics 365 (online) is only available for instances in the United States (US) region.
- A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
- We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
- Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.
- We are making this preview available so that you can try it and let us know what you think. Your feedback will help us prioritize work to include the capabilities you need most. We ask that you give us your suggestions and report problems by using our publicly available feedback site:

## About Microsoft Cognitive Services

Microsoft Cognitive Services includes several APIs that leverage the power of machine learning. Some Dynamics 365 features can use the Text Analytics APIs to detect sentiment, key phrases, topics, and language from the text found in your Dynamics 365 data.

## Set the text analytics connection

Dynamics 365 features that use the Cognitive Services Text Analytics service for keyword matching, like Document Suggestions, similar cases, and knowledge article suggestions, require a Cognitive Services Text Analytics service connection. This connects Dynamics 365 to the Cognitive Services Text Analytics service.

1. Go to **Settings** > **Administration** > **Azure Text Analytics Service Configuration**.
2. Review the information and click **Continue**.
3. Next, fill in the connection information.

| ITEM | DESCRIPTION |
| --- | --- |
| Name (required) | A logical name for the connection. |

| ITEM | DESCRIPTION |
|---|---|
| Azure Service URL (required) | The service URL for the Cognitive Services Text Analytics service. |
| Azure Account Key (required) | You will need to sign up for the Text Analytics API and obtain an API key. More information: Signing up for Text Analytics API. A $0.00 account is available for trying out this feature. |
| Description | A description of the connection. |

4. Click **Test Connection** to validate your settings.

5. Once the connection is successful, click **Activate**.

# Create similar record suggestion rules

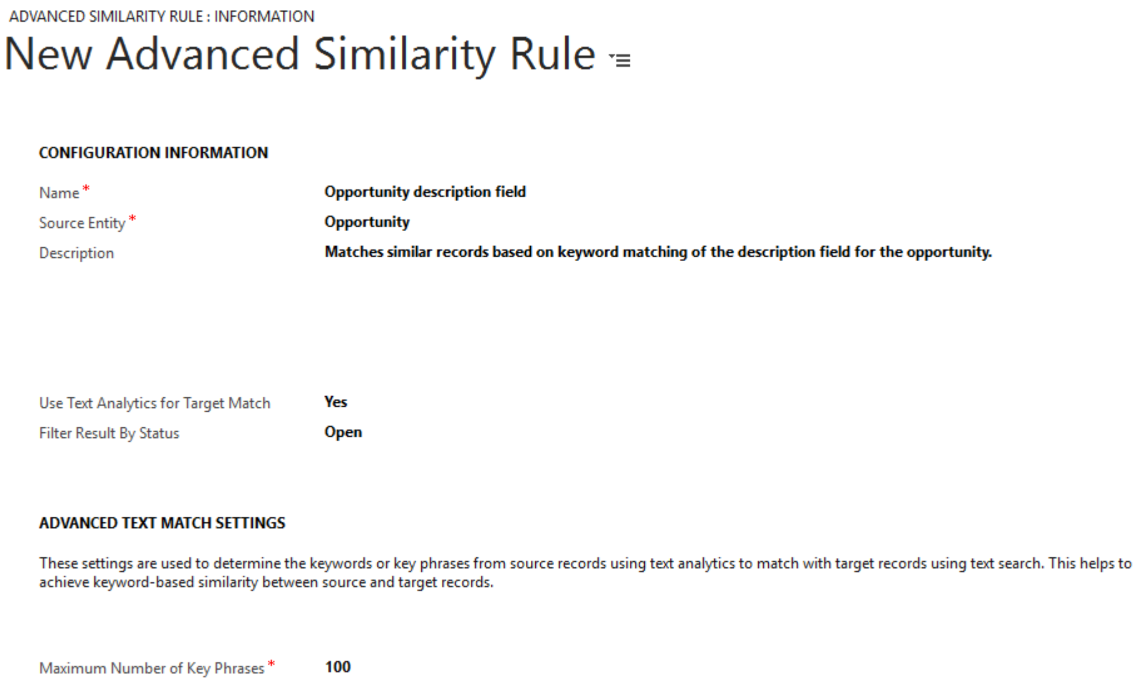
Set up automatic suggestion of similar records by creating rules. The rules you create can use either Cognitive Services Text Analytics or some features let you use the built-in similarities matching engine in Dynamics 365. Notice that you can only create one similar records suggestions rule for each entity type.

1. Go to **Settings** > **Data Management** > **Similar Records Suggestions Settings**.

2. Click **New**.

3. Fill in the fields on the New Advanced Similarity Rule dialog.

| ITEM | DESCRIPTION |
|---|---|
| Name (required) | The name of the topic model. |
| Source Entity (required) | The entity for which similar records are suggested. Select either Account, Case, Contact, Lead, Opportunity, or a custom entity that has an N:N relationship with one of the entities supported for similarity rules. |
| Description | A description of the similarity rule. |
| Use Text Analytics for Target Match | Default: **No**. Will use Dynamics 365 for keyword matching.<br><br>However, if you are using Cognitive Services Text Analytics, set this to **Yes**. More information: Set the text analytics connection |
| Filter Result by Status | Filter records by status. For example, you can filter Lead records on Qualified while ignoring Open and Disqualified Lead records. |
| **Advanced Text Match Settings** | |
| Maximum Number of Key Phrases (required) | The maximum number of keywords or key phrases to be determined with text searches. Acceptable values are 0 to 1,000. |




4. Click **Save**.

5. For opportunity similarity rules, notice that sample mappings are already added. To add a mapping, scroll down to **Match Fields**, and then click New (+).

6. In the New Text Analytics page, enter values for the following fields. These values are used to determine the keywords or key phrases from source records using text analytics to match with target records using text search. This helps to achieve keyword-based similarity between source and target records.

| ITEM | DESCRIPTION |
|---|---|
| Criteria | Exact match: only fields from the source entity are matched. **Note:** By default, not all fields are enabled for exact matching. More information: Enable a field for exact matching of similar records<br><br>Text match: Text in these fields is used for finding key phrases to match. For example, if you select **Case Title** or **Description**, text in these fields will be matched. |
| Entity | Choose an entity to use in creating a text search rule to find matching records in Dynamics 365. The following entities are available: Activity, Case, Case Resolution, Email, Fax, Note.<br><br>- Source entity, like Case and Note.<br>- Activity and out-of-box activity entities like Email, Fax, Letter, Phone Call, and Appointment.<br>- Any custom Activity entity related to the source entity. |

| ITEM | DESCRIPTION |
| --- | --- |
| Field* | Choose the field to use in creating a text search rule to find matching target records. The following types of fields are available: Option Set, Single Line of Text, Multiple Lines of Text.<br><br>Two types of fields are used for similarity analysis:<br><br>**Structured fields**: Used for exact match on a field to field basis. All fields except Multiple Lines of Text are available for exact match. Each field can be used only once.<br><br>**Text fields**: Only fields of type Text or Option Set are available. For Option Set, the corresponding label in the language of the user is used. Text fields are used for fuzzy match in similarity analysis with keywords/key phrase extraction. Each field can be used only once. |

7. Click **Save**.

8. Click **Activate**.

9. Add more mappings to create a comprehensive search of related records.

**Enable a field for exact matching of similar records**

To enable a field for exact match, add the field in the Quick find view of the corresponding entity.

1. Go to **Settings** > **Customizations** > **Customize the System**.

2. Expand **Entities**, expand the entity that you want to enable exact matching, such as the Account entity, and then click **Views**.

3. Click **Quick Find Active Accounts**, click **More Actions**, and then click **Edit**.

4. Under Common Tasks, click **Add Find Columns**, and then select the field that you want to enable exact matching.

5. Click **OK**, and then click **Save and Close** on the Quick Find Active Accounts page.

6. Because adding a field to a view is a customization, you must publish the customization to enable exact matching for the field. To do this, in the left navigation pane click the entity, such as Account, and then click **Publish**. To publish all customizations, click **Publish All Customizations**.

# Privacy notice

By enabling the Text Analytics feature, you enable dependent features within Dynamics 365 that leverage the Azure Cognitive Services Text Analytics API to offer advanced insights. These dependent features are:

- Knowledge suggestions

- Case topic analysis

- Similar cases suggestions

  An administrator can enable the Text Analytics feature under **Settings** > **Administration** > **System Settings** > **Preview** tab in the Dynamics 365 organization.

  By enabling the Text Analytics feature, when you set up text analytics–based knowledge suggestions within Dynamics 365, the case and its related entities' data is sent to the Azure Text Analytics API to extract keywords/phrases. No data is stored with the Azure Text Analytics API. Only configured fields in the

Knowledge Article configuration are sent to the Azure Text Analytics API to extract the terms. The administrator or customizer does have the option to deactivate the Knowledge Article Configuration to stop making API calls to the Azure Text Analytics API. Also, the customizer can stop using Text Analytics–based suggestions by switching back to Field-based suggestions in the Case Entity Form configuration.

By enabling the Text Analytics feature, when you set up case topic analysis within Dynamics 365, the case and its related entities data is sent to the Azure Text Analytics API for topic determination. No data is stored with the Azure Text Analytics API. Only configured fields in the Topic Model Configuration are sent to the Azure Text Analytics API to extract the topics. The administrator or customizer does have the option to deactivate the Topic Model to stop making Azure Text Analytics API calls.

By enabling the Text Analytics feature, when you set up similar cases suggestions within Dynamics 365, if the Advanced Text Analytics option is enabled in the Similarity Rule, then the case and its related entities' data is sent to the Azure Text Analytics API to extract keywords and phrases. Only text fields configured in the Similarity Rule are sent to the Azure Text Analytics API. No data is stored with the Azure Text Analytics API. The administrator or customizer does have the option to deactivate the Similarity rule to stop making Azure Text Analytics API calls.

Azure components and services that are involved with Text Analytics–based features are detailed in the following sections.

**Note:** For more information about additional Azure service offerings, see the Microsoft Azure Trust Center.

### Azure API App

The Azure API app triggers the Web jobs that read the data from the Dynamics 365 organization and send data to the Text Analytics API to do topic analysis. The Azure API App uses a Web job to do the actual data processing in the background and write the data output to Azure Blob Storage. The data is stored temporarily in Azure Blob Storage. Finally, data is deleted from Azure Storage once topic determination has been done.

### Azure Scheduler

Azure Scheduler is used to trigger a Web job on a scheduled basis to perform topic analysis. Only the topic model build schedule is shared with the scheduler.

### Azure Table

Azure Table is used for communicating the model version and organization context between the Azure API app and the Web job.

### Azure Blob Storage

Web jobs temporarily store data in Azure Blob Storage and delete it once the Logic App pipeline has finished execution.

### Azure Text Analytics API

The Azure Text Analytics API is sent data based on fields that are configured in active Knowledge Search fields or the Topic Model configuration or the Similarity Rule configuration. For example, case entity fields, such as title and description, plus the description field in related notes and activities, are configured in the Knowledge Search Field configuration.

Dynamics 365 Relevance Search

You can use Relevance Search, if it has been enabled by an administrator, to find similar records for cases. The text match fields and exact match fields used in the Similarity rule are used to invoke the Relevance Search API. Refer to the technical content for Dynamics 365 Relevance Search for data-handling details.

**See also**

Preview feature: Auto suggest knowledge articles

Preview feature: Suggest similar cases for a case

Enable document suggestions

# Preview feature: Automatically suggest knowledge articles

8/24/2018 • 4 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You want your customer service reps to quickly resolve cases with high customer satisfaction. By using the Microsoft Cognitive Services Text Analytics service with Microsoft Dynamics 365, you can set up service case analysis to automatically provide your support staff with more relevant solutions from knowledge articles. They'll spend less time searching for answers and more time providing the correct response. The knowledge article suggestion feature includes support for both out-of-box entities and custom entities with a one-to-may (1:N) or many-to-one (N:1) relationship to the source entity.

**IMPORTANT**

- This feature is currently only available for instances in the United States (US) region.
- A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
- We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
- Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

**Send us feedback**

We'd love your feedback on the knowledge article suggestions feature! To send us your feedback, register your account on the Microsoft Connect site, and then submit your feedback.

## Enable Text Analytics

To enable Text Analytics, do the following:

1. Go to **Settings** > **Administration**.
2. Click **System Settings** and open the **Previews** tab.
3. Under **Text Analytics Preview for Case Topic analysis, Suggest Similar Cases and Suggest Knowledge Articles**, set the **Enable Dynamics 365 Text Analytics Preview** to **Yes**.
4. Click **OK** to give your consent.
5. Click **OK** to close the **System Settings** dialog.

## Connect Dynamics 365 (online) to the Cognitive Services Text Analytics service

If you haven't already, create the Cognitive Services Text Analytics service connection. Set the Azure Machine Learning text analytics connection

# Set up Knowledge Search field settings

Set up keyword or key phrase determination fields to search knowledge articles to help resolve service cases.

1. Click **Settings** > **Service Management** > **Knowledge Search Field Settings**.
2. Click **New**.
3. Fill in the fields on the New Knowledge Search Model dialog.

| ITEM | DESCRIPTION |
|---|---|
| Name (required) | The name of the topic model. |
| Source Entity (required) | The entity that articles are suggested for. Limited to entities enabled for Knowledge Management (isKnowledgeManagementEnabled attribute). Go to **Settings** > **Customizations** > **Customize the System**. Select an entity, and then under **Communication and Collaboration**, enable **Knowledge Management**. |
| Maximum Number of Key Phrases (required) | The maximum number of keywords or key phrases to be determined using text analytics. |
| Description | A description of the search configuration. |

4. Click **Save**.
5. Scroll down to **Keyword or Key Phrase Determination Fields**, and then click **New** .
6. These settings determine the keywords or key phrases determined from the source record by using text analytics to match with knowledge base records using text search. This helps to achieve more relevant results with the knowledge base.

   Text Analytics Entity Mapping

| ITEM | DESCRIPTION |
|---|---|
| Entity | Choose an entity to use in creating a text search rule to find matching records in Dynamics 365. The following entities are available: Activity, Case, Case Resolution, Email, Fax, Note.<br><br>- Source entity like Case and Note.<br>- Activity and out-of-box activity entities like Email, Fax, Letter, Phone Call, and Appointment.<br>- Any custom entity with a 1:N or N:1 relationship to the source entity. |
| Field | Choose the field to use in creating a text search rule to find matching knowledge base records. The following types of fields are available: Option Set, Single Line of Text, Multiple Lines of Text. |

7. Add more fields to create a comprehensive search of related articles.
8. Click **Activate**.

## Modify the Case form to include knowledge base suggestions

These steps apply to any knowledge enabled entity.

1. Go to **Service** > **Cases**, and then select the case to include knowledge base suggestions.

2. Click the **More Commands** button .

3. Click **Form Editor**.

4. Click the **Conversation Tabs** box, and then click **Change Properties**.

5. Click the **Knowledge Base Search** tab, check the **Turn on automatic suggestions** check box, and then select **Text analytics** for the **Give knowledge base (KB) suggestions** drop-down list.

   If **Text analytics** is not available in the drop-down list, check to make sure the knowledge search model is activated.

6. Click **Save** > **Publish** to publish the modified form.

## View automatic suggestions in a case

1. Click **Service** > **Cases** and open a case record.

2. On the Activity wall, click **KB Records**.

   You can now see a list of KB articles related to this case.

   Click an article to review the text inline.

## Search for related knowledge articles and cases in the interactive service hub

The interactive service hub unifies vital information in one place, and lets you focus on things that require your attention, like finding articles and cases related to your active case.

1. Open the interactive service hub. See Open the interactive service hub.

2. Click **Service** > **Cases** and open a case.

3. Click the **Knowledge Base Search** button to find related knowledge articles.

4. Click the **Similar Cases** button to find related cases.

**See also**

What are Preview features and how do I enable them?
User's guide for the new interactive service hub

# Preview feature: Suggest similar cases for a case

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You're working on a support case and you wonder if there's a similar case that might help you resolve yours. With Dynamics 365 and Microsoft Cognitive Services Text Analytics, you can quickly find related cases and use them to resolve your current case. Keywords or key phrases in a service case are used to find similar cases.

> **IMPORTANT**
>
> - This feature is currently only available for instances in the United States (US) region.
> - A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
> - We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
> - Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.
>
> **Send us feedback**
>
> We'd love your feedback on the suggest similar cases feature! To send us your feedback, register your account on the Microsoft Connect site, and then submit your feedback.

## Enable Text Analytics

To enable Text Analytics, do the following:

1. Go to **Settings** > **Administration**.
2. Click **System Settings** and open the **Previews** tab.
3. Under **Text Analytics Preview for Case Topic analysis, Suggest Similar Cases and Suggest Knowledge Articles**, set the **Enable Dynamics 365 Text Analytics Preview** to **Yes**.
4. Click **OK** to give your consent.
5. Click **OK** to close the **System Settings** dialog.

## Connect Dynamics 365 (online) to the Cognitive Services Text Analytics service

If you haven't already, create the Cognitive Services Text Analytics service connection. Set the Azure Machine Learning text analytics connection

## Define and activate similarity rules

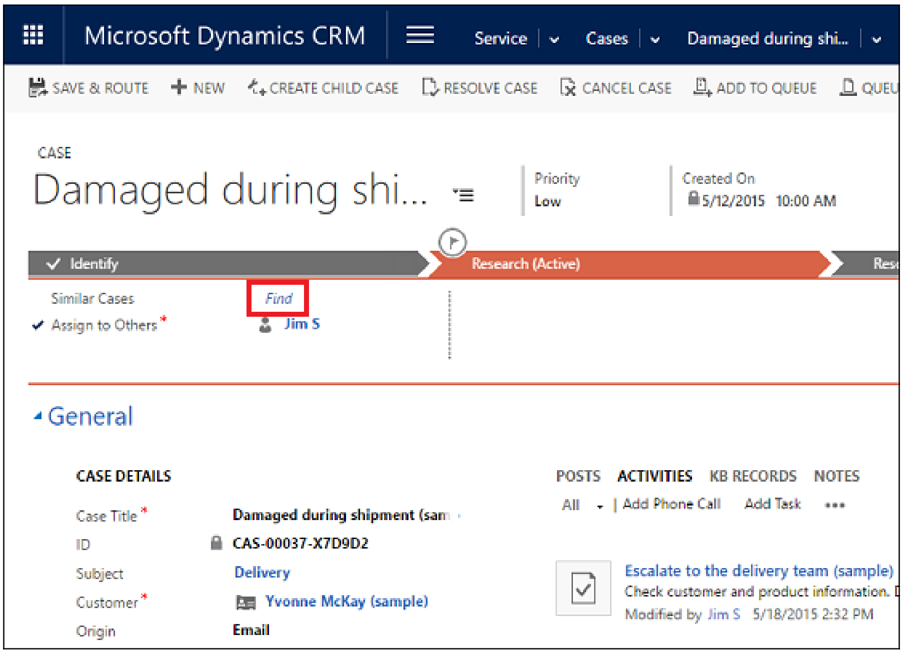
If you have not already defined similarity rules, see Create similar record suggestion rules. For this feature, you need to select Case as the Source Entity for the similarity rule.

## See related cases

After configuring the Cognitive Services Text Analytics service and setting up similar records suggestions, you're ready to see cases related to the ones you're working on.

1. Click **Service** > **Cases** and open a case.

2. For similar cases, click **Find**.




3. Click a case title to review that case's posts, activities, and notes. Then click **Found a Solution!** to add a case with useful information to the **Similar Cases** area (under **Case Relationships**) to the case you're working on.

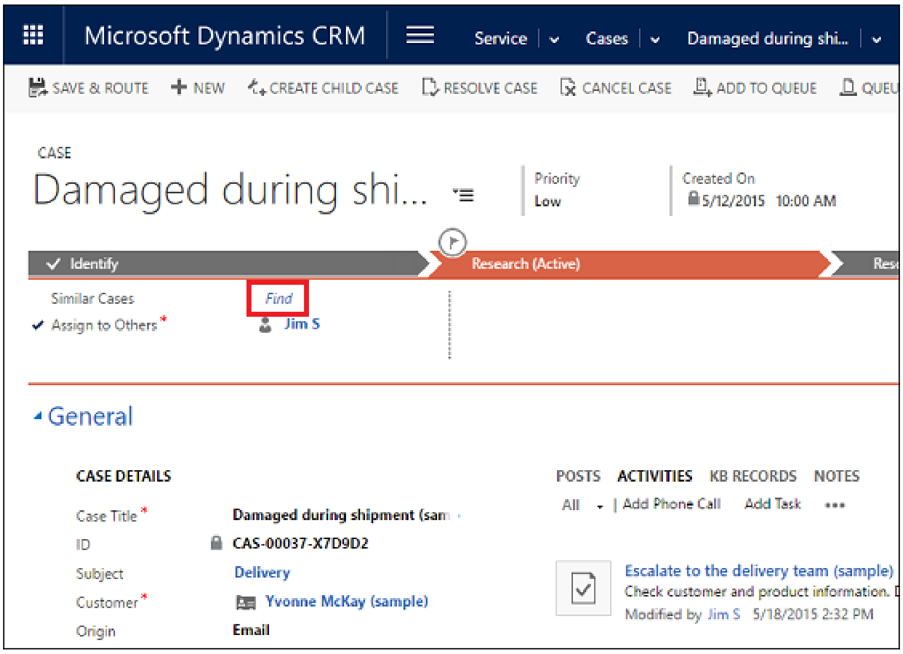
## See related cases in the interactive service hub

The interactive service hub unifies vital information in one place, and lets you focus on things that require your attention, like finding articles and cases related to your active case.

1. Open the interactive service hub. See Open the interactive service hub.

2. Click **Service** > **Cases** and open a case.

3. Click the **Similar Cases** button to find related cases.




## See also

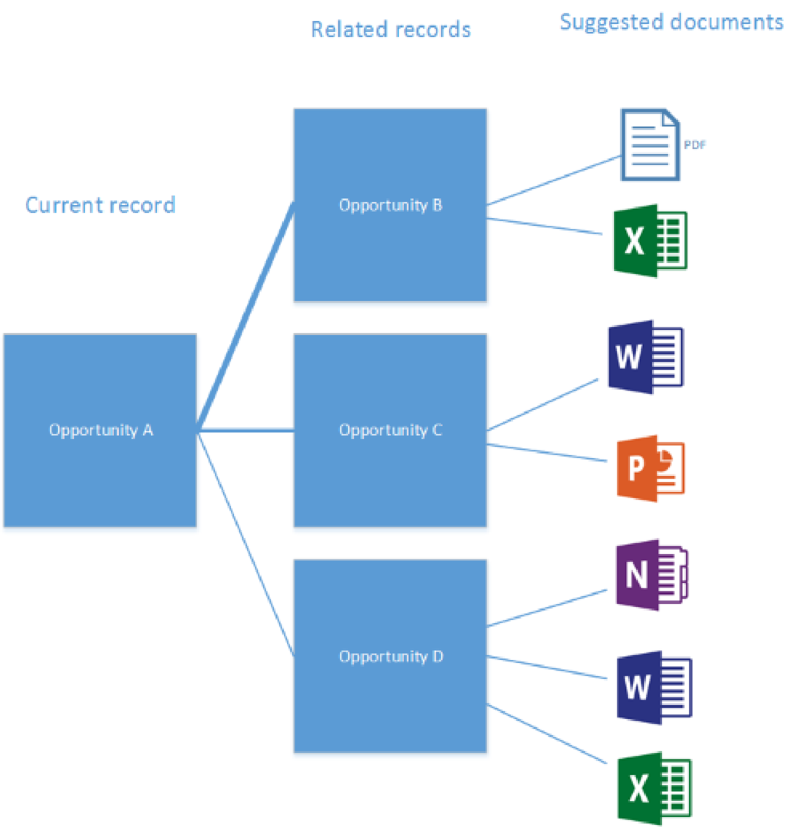
[User's guide for the new interactive service hub]

# Enable document suggestions to recommend related documents

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Enabling Document Suggestions helps your Dynamics 365 web browser and mobile users be aware of important documents related to what they're working on in Dynamics 365 such as a big sales opportunity. You, as the admin, define relevant fields. A recommendation engine using Azure text analytics uses keyword matching to associate related records to find similar documents. You create similarity rules in Dynamics 365 to provide your own similarity logic. Dynamics 365 then presents a list of suggested documents to the user while the user works in the current record.




> **NOTE**
> The Document Suggestions feature doesn't require a connection to the Azure Text Analytics service. If you choose not to use Azure Text Analytics, Document Suggestions will use the built-in keyword matching logic available in Dynamics 365. However, we recommend that you use Azure Text Analytics service for more advanced keyword matching.

Document Suggestions searches other like-entities to determine similarities found in documents located on a SharePoint site, OneDrive, or external location. Suggested documents can be in several different formats such as Word, Excel, PowerPoint, OneNote, Adobe PDF, and text files. When similar documents are found Document Suggestions presents them offering you the ability to open the document or make a copy.

## Requirements

The following are required to use Document Suggestions with Dynamics 365.

- Dynamics 365 (online)
- To suggest documents located on SharePoint:
  - Access to SharePoint Online, SharePoint 2013, or SharePoint 2016.
  - Document management must be set up in Dynamics 365. See Set up SharePoint integration with Microsoft Dynamics 365
- Relevance Search must be enabled. More information: Configure Relevance Search for the organization
- Document Suggestions works with Web browser, Dynamics 365 for tablets and Dynamics 365 for phones.
- To use Azure text analytics with Document Suggestions:
  - An Azure subscription is required to use the Azure Text Analytics service.
  - A system administrator must enable the text analytics connection in Dynamics 365. More information: Set the Azure Machine Learning text analytics connection
- A system administrator must define a similarity rule for each entity type that is to be included in Document Suggestions. More information: Create similar record suggestion mappings

## How it works

The entities that can use Document Suggestions are Contact, Opportunity, Lead, Account, Case, and custom entities.

You can use the built-in pattern matching that is included natively with the Document Suggestions feature, but we recommend that you use Azure Text Analytics service for more advanced keyword matching.

Document Suggestions searches only the locations and documents that the user has access to.

Locations where documents are found are searched in the following order:

1. SharePoint default site.
2. Other SharePoint sites.
3. OneDrive
4. Office 365 Groups (when solution is installed).
5. External URL (when configured).

Currently, Document Suggestions does not search attachments that are added to Notes in Dynamics 365 records.

**Adding an external URL to search another site**

External sites, such as an on-premises SharePoint document library can be included in Document Suggestions by adding an external URL for the site to be searched.

> **NOTE**
> For the best results when using an external site for document suggestions, we recommend that you use Azure Text Analytics, which provides more advanced keyword matching logic. Set the text analytics connection

Once you add the external URL to the enabled document suggestions feature, here is what your users will experience.

- Web browsers. When you run Dynamics 365 from a Web browser, after clicking **Document Suggestions**, users can then click **Other Recommendations** in the **Document Suggestions** page to display another page that may include more document suggestions found on the external site. Notice that the user may be prompted to sign in to the external site.

- Mobile apps. For the Dynamics 365 for tablets and Dynamics 365 for phones apps, after clicking **Document Suggestions**, users can click **Other Recommendations**, which opens the external site in the devices default web browser that may include more document suggestions found on the external site. Notice that the user may be prompted to sign in to the external site.

#### Constructing the external URL

The external URL should be constructed in a format that is understood by the external site. For example, for sites that use a construct similar to *https://contoso.com/search?{0}*, where **https://contoso.com/search?** is the search URL structure and {0} is the keyword string, Document Suggestions passes the keywords in the {0} parameter. The keywords that are passed to the URL are derived from similar record rules that include entity mappings of **Text Match**. More information: Create similar record suggestion rules

The values found in the text fields of the similarity rule mappings are used as keywords to build the query that is passed to the external site, similar to the below URL, where *keyword* is the text values found in the similarity rules mappings and *&* represents a whitespace that Document Suggestions uses to separate each keyword.

*https://contoso.com/search?keywordA&keywordB&keywordC*

For an on-premises SharePoint server, you can add an external URL that points to a subsite similar to this, where *mysharepoint* is the web site name *sites* is the site name and *subsitename* is the subsite name.

*https://mysharepoint/sites/subsitename/_layouts/15/osssearchresults.aspx?&k={0}*

## Set up the Azure text analytics connection

To use Azure text analytics with Document Suggestions, an Azure text analytics connection must be configured. More information: Set the Azure Machine Learning text analytics connection

> **NOTE**
> The Document Suggestions feature doesn't require a connection to the Azure Text Analytics service. If you choose not to use Azure Text Analytics, Document Suggestions will use the built-in keyword matching logic available in Dynamics 365. However, we recommend that you use Azure Text Analytics service for more advanced keyword matching.

## Define and activate similarity rules

If you have not already defined similarity rules, see Create similar record suggestion mappings.

## Enable Document Suggestions

To enable Document Suggestions, do the following:

1. Go to **Settings** > **Administration**.

2. Go to **System Settings** > **Document Management** > **Manage Document Suggestions**.

3. In the **Select Entities** area, select the entities that you want to include in Document Suggestions, and then click **Apply**.

> **TIP**
>
> If the entities (contact, opportunity, lead, account, or custom) aren't listed in the **Select Entities** area, it is because similarity rules for the entity have not been defined and activated. Create similar record suggestion mappings

4. Set external URL to include in Document Suggestions. By default, Document Suggestions searches in Office 365 services like SharePoint or OneDrive. If you want to search an external site in addition to the available Office 365 services, such as an on-premise SharePoint site, enter the base URL to the external system. Dynamics 365 will append a search query string to the base URL you provide. More information: Adding an external URL to search other sites

**See also**

# Dynamics 365 Government

10/2/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

In response to the unique and evolving requirements of the United States public sector, Microsoft has created Microsoft Dynamics 365 Government that is available to qualified government entities in the United States. On October 11, 2016, Microsoft announced the next generation of intelligent business applications in the cloud under the brand Microsoft Dynamics 365. To this end, Microsoft Dynamics 365 Government entails a continuity of the protected environment that was originally branded Microsoft CRM Online Government where the protections afforded to the government community cloud under the new brand are now represented by four discrete functions: Sales, Customer Service, Field Service, and Project Service Automation. This section provides an overview of features that are specific to Microsoft Dynamics 365 Government.

## About Dynamics 365 Government plans

Dynamics 365 Government plans are available to qualified government and private entities, limited to (i) United States (US) federal, state, local, tribal, and territorial government entities; (ii) private entities using Dynamics 365 Government to provide solutions to a government entity or a qualified member of the cloud community; and (iii) private entities with customer data subject to government regulations for which the use of Dynamics 365 Government is the appropriate service to meet the regulatory requirements. Access to Dynamics 365 Government plans is restricted to the offerings described below, each plan is offered as a monthly subscription and can be licensed to an unlimited number of users:

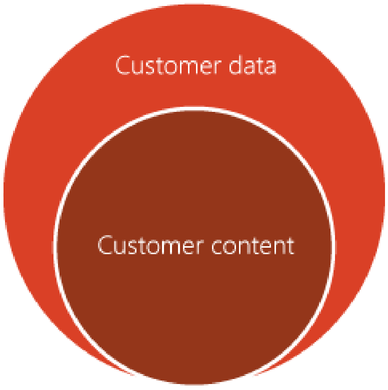
- Dynamics 365 Plan 1 for Government
- Dynamics 365 for Sales, for Government
- Dynamics 365 for Customer Service, for Government
- Dynamics 365 for Field Service, for Government
- Dynamics 365 for Project Service Automation, for Government
- Dynamics 365 for Case Management, for Government
- Dynamics 365 for Team Members, for Government
- Enhance Support for Dynamics 365 Applications and Plan 1 for Government
- Pro Direct Support for Dynamics 365 Applications and Plan 1 for Government
- Dynamics 365 - Additional Portal for Government
- Dynamics 365 - Additional Portal Page Views for Government
- Dynamics 365 - Additional Production Instance for Government
- Dynamics 365 - Additional Non-Production Instance for Government
- Dynamics 365 - Additional Database Storage for Government

**What is "customer data" and "customer content?"**

This section describes Dynamics 365 Government commitments that apply to customer content and to customer data.

Customer data, as defined in the Online Service Terms, means all data, including all text, sound, video, or image files, and software, that are provided to Microsoft by, or on behalf of, Customer through use of the Online Service. Customer content refers to a specific subset of customer data that has been directly created by users, such as content stored in databases through entries in Dynamics 365 entities (e.g. contact information). Content is generally considered confidential information, and in normal service operation, is not sent over the Internet without encryption.

For more information on the Dynamics 365 (online) protection of customer data, see the Microsoft Online Services Trust Center.




## Data segregation for Government Community Cloud

When provisioned as part of Dynamics 365 Government, the Dynamics 365 (online) service is offered in accordance with the National Institute of Standards and Technology (NIST) Special Publication 800-145.

Microsoft refers to this offer as the Government Community Cloud.

In addition to the logical separation of customer content at the application layer, the Dynamics 365 Government service provides your organization with a secondary layer of physical segregation for customer content by using infrastructure that is separate from the infrastructure used for commercial Dynamics 365 (online) customers. This includes using Azure services in Azure's Government Cloud. To learn more, see Azure Government.

## Customer content located within the United States

Dynamics 365 Government services are provided from datacenters physically located in the United States. Dynamics 365 (online) customer content is stored at rest in datacenters physically located only in the US.

If your users are located within the US while using Microsoft Social Engagement or if you adopt the use of Active Directory Federation Services (AD FS) 2.0 and set up policies to help ensure your users connect to the services through single sign-on, any customer content that is temporarily cached in Microsoft Social Engagement will be located in the US.

## Restricted data access by administrators

Access to Dynamics 365 Government customer content by Microsoft administrators is restricted to personnel who are US citizens. These personnel undergo background investigations in accordance with relevant government standards.

## Certifications and accreditations

Dynamics 365 Government is designed to support the Federal Risk and Authorization Management Program (FedRAMP) accreditation at a High Impact level. FedRAMP artifacts are available for review by federal customers who are required to comply with FedRAMP. Federal agencies can review these artifacts in support of their review to grant an Authority to Operate (ATO). It is important to note that, at the present time, the latest brand (Microsoft Dynamics 365 Government) may not show in our ATOs; however, this does not entail a degradation of the security protections afforded to the online services environment as there is application service continuity between the previous brand (Microsoft CRM Online Government) and Dynamics 365 Government, as described above. As Microsoft moves to refresh FedRAMP artifacts as part of the standard audit cycles, branding references will be updated accordingly.

Dynamics 365 Government has features designed to support customer's CJIS Policy requirements for law enforcement agencies. Please visit the Dynamics 365 Trust Center for more detailed information related to certifications and accreditations.

## Dynamics 365 Government and other Microsoft services

Dynamics 365 Government includes several features that allow users to address customer calls through Skype for Business, email editing for sales materials and, in general, integration with other Microsoft enterprise service offerings such as Office 365 for Government. Dynamics 365 Government is deployed within Microsoft datacenters in a manner consistent with a multi-tenant, public cloud deployment model; however, client applications including but not limited to the web-user client, Dynamics 365 for tablets, Dynamics 365 for phones, Dynamics 365 for Outlook, Unified Service Desk for Dynamics 365 and any third-party client application that connects to Dynamics 365 Government are not part of Dynamics 365 Government's accreditation boundary and government customers are responsible for managing them.

Dynamics 365 Government leverages the Office 365 customer administrator UI for customer administration and billing – Dynamics 365 Government maintains the actual resources, information flow, and data management, while relying on Office 365 to provide the visual styles that are presented to the customer administrator through their management console. For purposes of FedRAMP ATO inheritance, Dynamics 365 Government leverages the physical data centers managed by Microsoft's Global Foundation Services (GFS) and Azure (including Azure for Government) ATOs for infrastructure and platform services, respectively.

## Dynamics 365 Government and third-party services

Dynamics 365 (online) provides the ability to integrate third-party applications into the service. These third-party applications and services might involve storing, transmitting, and processing your organization's customer data on third-party systems that are outside of the Dynamics 365 (online) infrastructure and therefore are not covered by the Dynamics 365 (online) compliance and data protection commitments. We recommend that you review the privacy and compliance statements provided by the third parties when assessing the appropriate use of these services for your organization.

## Dynamics 365 Government and Azure Services

Azure Active Directory (AAD) is not part of the Dynamics 365 Government accreditation boundary and government customers are responsible for using AD FS to uniquely identify and authenticate their organizational users. Notwithstanding, it is important to note that AAD provides critical functionality to both Dynamics 365 Government and AD FS, whose dependencies are described in detailed in the Dynamics 365 Government SSP (Service Security Plan).

When a user of an organization employing AD FS attempts to access Dynamics 365 (online), the user is redirected to a login page hosted on the organization's AD FS server. The user provides his credentials to his organization's AD FS server, which attempts to authenticate the credentials using the organization's existing Active Directory infrastructure. If the credentials are authenticated, the organization's AD FS server issues a SAML (Security Assertion Markup Language) ticket containing information about the user's identity and group membership. The customer AD FS server signs this ticket using one half of an asymmetric key pair and it sends the ticket to AAD via encrypted TLS. AAD validates the signature using the other half of the asymmetric key pair and grants access based on the ticket. The user's identity and group membership information remain in an encrypted fashion in AAD; in other words, limited user-identifiable information is stored in AAD. Full details of the AAD security architecture and control implementation can be found in the Azure SSP. The AAD account management services are hosted on physical servers managed by the Microsoft Global Foundation Services (GFS). Network access to these servers is controlled by GFS-managed network devices using rules set by Azure. Users do not interact directly with AAD.

### See also

Dynamics 365 (online) Government - Feature availability
Dynamics 365 IP Address Ranges (prior to v9.x)
Dynamics 365 IP Address Ranges (v9.x) Focus only on AzureCloud.usgovtexas and AzureCloud.usgovvirginia

# Dynamics 365 (online) Government - Feature availability

10/4/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Microsoft strives to maintain functional parity between our commercially available service and that which is servicing the Dynamics 365 Customer Engagement for U.S. Government - referred to as Dynamics 365 GCC. However, there are notable exceptions to this affected by dependent service or partner-solution availability, market priorities, or compliance regulations.

At this time, preview features in the commercial offering are not available to Dynamics 365 Government Community Cloud (GCC) customers. This is intentional, as the GCC represents a community leveraging our generally available services, further protected with heightened compliance demands of the U.S. Government and Government community customers.

Dynamics 365 GCC currently supports the following versions:

- Dynamics 365, version 9.0.x
- Dynamics 365, version 8.2.x
- Microsoft Dynamics CRM Online 2016, Update 1

There are certain experiences that are currently not available with Dynamics 365 GCC. We continue to evaluate these for incorporation into future releases. The following generally available features are not currently available:

- Activity Logging
- AppSource (ability to install Applications directly from AppSource)
- Data Export Service
- Organization Insights
- CAFEx Integration
- Connected Field Service
- Gamification
- Home.Dynamics.com
- Insights, powered by InsideView
- Mobile offline
- PowerBI “embedded” user dashboard experience
- Relevance Search
- Resource Scheduling Optimization
- Versium Predict

There are a number of other business application apps and services that are not currently available as a service operating within the GCC at this time. They include:

- Microsoft PowerApps
- Microsoft Flow – Please note that it is technically possible to connect to Dynamics 365 GCC from Flow.
- Microsoft Dynamics 365 for Marketing
- Microsoft Dynamics 365 for Talent
- Microsoft Dynamics Social Engagement – This is a feature that cannot be used by Government customers,

worldwide.

- Microsoft Dynamics Voice of the Customer – Please note that while this is not available in GCC, it is available to install into a customer's Instance(s) running GCC services; all integration points will work as they do in our non-GCC environments.
- Microsoft Dynamics 365 for Finance and Operations - Please note that while this is not available in GCC, it is available to purchase and associate to a customer's tenant running GCC services.
- Microsoft Dynamics 365 for Retail - Please note that while this is not available in GCC, it is available to purchase and associate to a customer's tenant running GCC services.

## Network ports for Dynamics 365 Government

The following ports are open for outbound connections between Dynamics 365 Government and internet services.

- 80 HTTP
- 443 HTTPS
- 465 Secure SMTP
- 587 Secure SMTP
- 995 Secure POP3

Customizations or email configurations in Dynamics 365 GCC can only use these ports.

**See also**

Microsoft Dynamics 365 (online) Government
Important changes coming in Dynamics 365 Customer Engagement
Dynamics 365 IP Address Ranges (prior to v9.x)
Dynamics 365 IP Address Ranges (v9.x) Focus only on AzureCloud.usgovtexas and AzureCloud.usgovvirginia
PowerBI for US Government Customers
Compliance Offerings for Dynamics 365

# System Settings dialog box - General tab

8/24/2018 • 7 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to change general system-level settings like preferences for saving, decimal and currency precision, and other default settings for Dynamics 365.

## Open the System Settings dialog box (if it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Click the **System Settings** > **General** tab.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Allow text wrapping in form fields labels and values** | Default: Yes. Choose **Yes** to allow text wrapping. |
| **Select the default save option for forms** | |
| Enable auto save on all forms | If Yes, which is the default, after a record is created (initially saved), any changes made to a form will automatically be saved thirty seconds after the change is made. The 30-second period starts again after a change is made. If no changes are made, the automatic save doesn't happen.<br><br>More information: Manage auto-save |
| **Set Skype for Business Options** | |
| Enable presence for the system | If Yes, which is the default, instant messaging will display the current status for users, contacts, opportunities, or leads. This only applies to lists and sub-lists for entities with an updated user interface. |
| **Set the full-name format** | |
| Name Format | Select the order in which you want customer and user names to be displayed. The default is First Name Last Name. |
| **Set the currency precision that is used for pricing throughout the system** | |

| SETTINGS | DESCRIPTION |
|---|---|
| Pricing Decimal Precision | Select how many decimal points to use for a currency. The default is 2. |
| **Set whether reassigned records are shared with the original owner** | |
| Share reassigned records with original owner | Select whether a record is shared with the original owner of the record, or completely reassigned to another user. The default is No. |
| **Set blocked file extensions for attachments** | Prevent users from attaching files with specific file name extensions. |
| **Set the currency display option** | |
| Display currencies by using | Set how to display currencies, either by a currency symbol, which is the default setting, or by currency code. For example, a currency symbol could be $, and the currency code could be USD. |
| **Set up search** | |
| Enable Relevance search | If enabled, you can use Relevance search to find records across multiple entities, sorted by relevance. |
| Enable Quick Find record limits | If Yes, which is the default, if more than 10,000 records are found, a message will be displayed that suggests a more selective search.<br><br>More information: Configure Relevance search for the organization |
| Select entities for Categorized Search | Click **Select** to choose the entities to include when users do a search in Dynamics 365 for tablets. |
| **Enable Bing Maps** | |
| Show Bing Maps on forms | If Yes, which is the default, Dynamics 365 on-premises users will need to enter a Bing Maps key. Dynamics 365 (online) users don’t need to enter a key. |
| Please enter Bing Maps key (on-premises) | On-premises users can obtain a Bing Maps key from: Bing Maps Dev Center |
| **Set the default country/region code** | |
| Enable country/region code prefixing | If enabled, which is the default, Dynamics 365 will prefix the country/region code to numbers that users are trying to call. |
| Country/Region Code Prefix | The default is+1, which is the country/region calling code for North America. |
| **Set the telephony provider** | |

| SETTINGS | DESCRIPTION |
|---|---|
| Select provider for Click to call | Choose which provider to enable outbound calls from within Dynamics 365. This setting doesn't apply to Dynamics 365 for tablets or Dynamics 365 for phones. |
| **Set whether users see Dynamics 365 message** | |
| Users see app download message | If Yes, which is the default, users will see a message regarding downloading the Dynamics 365 for tablets app. |
| **Set custom Help URL** | |
| Use custom Help for customizable entities | If you want to replace the default Help content with custom Help designed for your users, click **Yes**. After you enable custom Help, you can enter a **Global Custom Help URL**. |
| Global custom Help URL | To replace the default Help with a single URL for all customizable record types (entities), enter the URL here. You also have the option of entering override URLs for each record type (entity) for customizable record types. More information: Customize the Help experience |
| Append parameters to URL | If you click **Yes** to append parameters to the URL, you can make your Help content more dynamic. For example, you can access parameters for User Language Code, Entity Name, Entry Point, and Form ID. More information: Customize the Help experience |
| Enable Learning Path | Changes access to Learning Path for an entire organization. More information: On/off switch for Learning Path (guided help). |
| Enable Learning Path Authoring | Defaults to No. Set to Yes if you want enable users to author Learning Path content.<br><br>More information: Create your own guided help (Learning Path) for your customers |
| **Disable Social Engagement** | |
| Prevent feature from receiving social data in Dynamics 365 | Defaults to No. If you don't want to receive social data in Dynamics 365, select **Yes**. If you disable social engagement, your organization will not be able to receive social data in Dynamics 365. Users can continue to work with existing social data, however. |
| **Set whether users see welcome screen** | |
| Display welcome screen to users when they sign in | When users start Dynamics 365, they're presented with a welcome screen (navigation tour) that provides a quick overview of Dynamics 365. Click **No** to disable this tour for all users in your organization. |
| **Use legacy form rendering** | |

| SETTINGS | DESCRIPTION |
|---|---|
| For compatibility, use the legacy form rendering engine. Note that performance may be adversely affected. | In CRM Online 2015 Update 1 and Dynamics 365 on-premises, we made enhancements to Dynamics 365 forms so that they load faster.<br><br>However, if you have forms that include unsupported customizations, these enhancements can cause compatibility problems. To avoid this, you can temporarily turn the form enhancements off by choosing **Yes**. We recommend that you reset this setting to **No** after addressing scripting problems so you can take advantage of optimized forms. **Note:** When a form that includes unsupported customizations is used, such as unsupported JavaScript, the form may fail to load or the user will receive an error message.<br>• If the form just fails, set the **Use legacy form rendering** option to **Yes**. If the form loads after you select this option, you may have unsupported customizations.<br>• If the user receives an error, click "View the data that will be sent to Microsoft" and see the details in the <CrmScriptErrorReport> tags. |
| **Set options for the default app: Dynamics 365 – custom** | |
| Show default app on landing page and in app switch | Default is Yes. Change to No to prevent the default app from appearing on the Dynamics 365 home page and in the app selector menu.<br><br>More information: For admins and end users: Introducing the Dynamics 365 home page |
| Default app name | Enter the label to use for the default app. This appears on the Dynamics 365 home page. The default label is Dynamics 365 - custom.<br><br>More information: For admins and end users: Introducing the Dynamics 365 home page |
| **Set the default card state for Interactive Dashboards** | |
| Display cards in expanded state | Click **Yes** to see the detailed card form in a dashboard. If set to **No** (default), only the header and minimal details are displayed in the card form. |
| **Set session timeout** | More information: User session timeout |
| Session timeout settings | Choose **Set custom** to specify values different from default values. |
| Enter maximum session length | Enter the number of minutes for a session to remain open. |
| How long before the session expires do you want to show a timeout warning? | Enter the number of minutes prior to session expiration for a timeout warning to be displayed. |
| **Set inactivity timeout** | More information: Inactivity timeout |

| SETTINGS | DESCRIPTION |
|---|---|
| Enable session timeout due to inactivity | Choose **Yes** to enable inactivity timeout. |
| Duration of inactivity before timeout | Enter the number of minutes of inactivity after which a session timeouts. |
| How long before the session expires do you want to show an inactivity warning? | Enter the number of minutes prior to session expiration for an inactivity warning to be displayed. |
| **Set Azure Content Delivery Network options** | |
| Load default static content from Content Delivery Network | Default is **Yes** and Dynamics 365 will load out-of-the-box static content from the Azure Content Delivery Network (CDN) service. For firewall restrictions and IP whitelisting related issues, system administrators can select **No** to disable the Azure Azure Content Delivery Network feature. |

## See also

Manage auto-save
Customize the Help experience

# System Settings dialog box - Calendar tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to configure calendar settings for Dynamics 365.

## Open the Calendar System Settings dialog box (if it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Go to **System Settings** > **Calendar** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| **Set scheduling options** | |
| Maximum duration of an appointment in days | Dynamics 365 users can create appointments to meet or talk to customers. Users create these appointments on the Service Calendar or in the Activities area.<br><br>You can use this setting to control the maximum number of days that your users can schedule an appointment for. The default is 10 days. |

**See also**

Create or edit an appointment

# System Settings dialog box - Formats tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

You can control how Dynamics 365 displays numbers, currencies, times, and dates for your organization.

## Open the Formats System Settings dialog box (it it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.
3. Choose **System Settings** > **Formats** tab.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Organizational Standards and Formats** | |
| **Current Format** | Default: your organization's language and locale. Choose **Customize** to customize number, currency, time, and date formats for your organization. |
| Format Preview | Preview the settings for the selected language and locale. |

### See also

Customize regional options (admins)

# System Settings dialog box - Auditing tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Enable auditing to track changes to your organization's data and maintain a log of changes.

## Open the System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **System Settings** > **Auditing** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| **Audit Settings** | |
| Start Auditing | Start or stop auditing. |
| Audit user access | If enabled, Dynamics 365 tracks when the user started accessing Dynamics 365 and whether or not the user accessed the application by using the web application or Dynamics 365 for Outlook. |

Specify to audit specific areas of the product, as described in the following table.

| AUDITING AREA | ENABLE THE START OF AUDITING FOR THESE ENTITIES |
|---|---|
| **Enable Auditing in the following areas** | |
| Common Entities | Account, Contact, Lead, Marketing List, Product, Quick Campaign, Report, Sales Literature, Security Role, and User |
| Sales Entities | Competitor, Invoice, Opportunity, Order, and Quote |
| Marketing Entities | Campaign |
| Customer Service Entities | Article, Case, Client Feedback, Contract, and Service |

**See also**

Audit data and user activity

# System Settings dialog box - Email tab

8/24/2018 • 5 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to set up email processing in Dynamics 365.

## Open the System Settings dialog box (if it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Email Configuration**.

3. Choose **Email Configuration Settings**.

| SETTINGS | DESCRIPTION |
|---|---|
| **Configure email processing** | |
| Process Email Using | Select whether you want to process email by using server-side synchronization or the Email Router. server-side synchronization is the preferred synchronization method.<br><br>More information: Integrate your email system with Dynamics 365 |
| **Configure default synchronization method** | For any mailbox that is automatically created in Dynamics 365 when a user or queue is created, the default email settings as defined in this section will be applied. |
| Server Profile | For server-side synchronization, select the email server profile that you want to use. The email server profile holds the configuration data that enables Dynamics 365 to connect to Microsoft Exchange. If you're connecting Dynamics 365 (online) with Exchange Online, the email server profile is automatically created for you. |
| Incoming Email | Select whether you want to use Dynamics 365 for Outlook, the Email Router, server-side synchronization, or a forward mailbox for processing incoming email. More information: Create forward mailboxes or edit mailboxes |
| Outgoing Email | Select whether you want to use Dynamics 365 for Outlook, the Email Router, or server-side synchronization for processing outgoing email. |

| SETTINGS | DESCRIPTION |
| --- | --- |
| Appointments, Contacts, and Tasks | Select whether you want to use Dynamics 365 for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks between Outlook and Dynamics 365. **Note:** You can't synchronize appointments, contacts, and tasks if you're synchronizing with a POP3 email server. |
| **Email processing for unapproved users and queues** | Select these check boxes if you want to allow email processing only for users and queues whose email addresses have been approved by the system administrator.<br><br>- Process email only for approved users<br>- Process email only for approved queues |
| **Configure folder-level tracking and email correlation** | |
| Use folder-level tracking for Exchange folders (server-side synchronization must be enabled) | Users can set up Exchange tracking folders, and then move messages to those folders to track them automatically on virtually any device. More information: Track Outlook email by moving it to a tracked Exchange folder<br><br>Folder-level tracking provides 100% tracking accuracy. To use folder-level tracking:<br><br>- You must select this check box.<br>- Your organization must synchronize email through server-side synchronization. More information: Set up server-side synchronization |
| Use correlation to track email conversations | Select this check box if you want to link email activities with other related records using the information in the email headers. This method uses email properties for correlation and is more accurate than smart matching, but less accurate than folder-level tracking or tracking tokens. More information: Email message filtering and correlation **Note:** Email correlation using email headers works best when email is processed using server-side synchronization. If you're using the Email Router to process email, you can use tracking tokens or smart matching to correlate email activities with related records. |
| Use tracking tokens | Select this check box to use tracking tokens and to configure how Dynamics 365 displays them in the Subject line of the email messages.<br><br>Tracking tokens provide 100% tracking accuracy. If you don't want to see tokens in Subject lines, however, consider folder-level tracking, which also provides 100% tracking accuracy.<br><br>You can configure prefixes and other sections of tracking tokens. Long prefixes or too many prefix changes may cause lost data in history, however. More information: Email message filtering and correlation |
| Use smart matching | Select this check box to use smart matching to correlate email based on the similarity between email messages. Smart matching isn't as accurate as tracking tokens or folder-level tracking. More information: Email message filtering and correlation |

| SETTINGS | DESCRIPTION |
|---|---|
| **Set tracking options for emails between Dynamics 365 users** | |
| Track email sent between two Dynamics 365 users as two activities | Select this option to create two email activities between Dynamics 365 users, one for the sender and one for the recipient. |
| **Set email form options** | |
| Use secure frames to restrict email message content | If this is set to **Yes**, you may see the following error message when you're reading email: "This content cannot be displayed in a frame". Although this can make sending sensitive content in email less secure, changing the setting to **No** typically eliminates this error. |
| Allow messages with unresolved recipients to be sent | Set this to **Yes** if you want to send email messages that have unresolved recipients. |
| Set To, cc, bcc, fields as unresolved values if multiple matches are found in Incoming Emails. | Use this setting to choose which record an email address resolves to when there are multiple possible matches in **to**, **cc**, or **bcc** fields of an email. When you select **Yes**, if the **to**, **cc**, or **bcc** fields of an email have an email address that can be resolved to multiple contacts (or other records), the email address will be resolved in the unresolved mode instead of resolving to all possible records. Unresolved email addresses can then be resolved individually as you encounter them. The default value is **No**. |
| Apply same email address to all unresolved matches when you manually resolve it for one. | When set to **Yes**, the same email address is applied to all similar unresolved email addresses when resolved in one email activity. When set to **No**, the email address is applied only to the specific email activity and does not resolve similar addresses present in other email activities. The default value is **Yes**.<br><br>This setting appears when **Set To, cc, bcc, fields as unresolved values is multiple matches are found in Incoming Emails** is set to **Yes**. |
| **Set file size limit for attachments** | |
| Maximum file size (in Kilobytes) | Increase or decrease the maximum file size for attached files. The default size is 5 MB (5,120 KB). The maximum size is 128 MB (131,072 KB). |
| **Configure alerts** | Select check boxes for the type of alerts that must be sent to Dynamics 365 users:<br><br>- Error (default)<br>- Warning<br>- Information (default) **Tip:** Select **Warning** if you're troubleshooting or testing or want to get more detailed messages on the alert wall. |

| SETTINGS | DESCRIPTION |
| --- | --- |
| Notify mailbox owner | By default, the system administrator is notified of any error that occurs for an email server profile.<br><br>Select this check box if you also want to notify the mailbox owner. |

### See also

Track Outlook email by moving it to a tracked Exchange folder

Frequently asked questions about synchronizing records between Microsoft Dynamics 365 and Outlook

Set up email through server-side synchronization

# System Settings dialog box - Marketing tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to configure marketing settings for Dynamics 365.

## Open the Marketing System Settings dialog box (if it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **System Settings** > **Marketing** tab.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Set whether direct email through mail merge is enabled in campaigns** | |
| Enable Direct Email via Mail Merge | Default: Yes. If Yes, users can send email as a campaign activity using the mail merge feature. **Note:** To enable this option, the security role assigned to users for whom you want to enable mail merge must also include the Mail Merge privilege. |
| **Set whether campaign responses are created for incoming campaign activity email (Available only if Email tracking is enabled)** | |
| Create campaign responses for incoming email | Default: Yes. If Yes, Dynamics 365 creates campaign response records automatically when email messages are received in response to a specific marketing campaign. |
| **Set the auto-unsubscribe options (Available only if Email tracking is enabled)** | |
| Set "Do Not Send Marketing Material" option when unsubscribe email is received | Default: No. If Yes, when an unsubscribe email is received, the preference setting for the account, contact, or lead from the marketing list gets updated automatically to not send marketing materials. |
| Send acknowledgement to customers when they unsubscribe | If the previous setting **Set "Do Not Send Marketing Material"** is Yes, you can use this setting to send a response to customers when they unsubscribe. |

| SETTINGS | DESCRIPTION |
| --- | --- |
| Template for Acknowledgement Email | If the two previous settings are Yes, you must specify an email template to use to respond to customers when they unsubscribe. |

# System Settings dialog box - Customization tab

9/27/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the Customization tab in System Settings to set preferences for plug-in and workflow tracing and also the use of application mode..

## Open the System Settings dialog box (if it isn't already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **System Settings** and then choose the **Customization** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| **Application mode** | |
| Set whether Dynamics 365 can be opened in a browser window without menu, navigation, and command bars. | |
| Open Dynamics 365 in Application mode | Select this check box to enable application mode. When this mode is enabled, Dynamics 365 can be opened in a browser without menus, navigation, or toolbars. Hiding these parts of the browser causes Dynamics 365 to appear like a separate application rather than a website. By default, application mode isn't enabled. |
| **Plug-in and custom workflow activity tracing** | |
| Enable logging to plug-in trace log | You can now store detailed information about an exception or trace event raised by a custom code to help developers debug plug-ins or custom workflow activity that they develop using the customization methods supported by Dynamics 365.<br><br>- To capture trace logs only for exceptions, select **Exception**.<br>- To capture logs for all errors and general trace events, select **All**.<br>- To disable capturing trace logs, select **Off**.<br><br>More information: Debug a plug-in **Warning:** We recommend that you don't keep this option enabled for an extended period because it may have performance implications in your organization. |

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Enable Microsoft Flow** | More information: Enable embedded Flow to automate processes |
| Show Microsoft Flow on forms and in the site map | Default: Yes. Choose **Yes** to enable embedded Microsoft Flows in your organization. |

## See also

Debug a plug-in

# System Settings dialog box - Outlook tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to configure how Outlook interacts with Dynamics 365.

## Open the System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **System Settings** > **Outlook** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| **Set email promotion options for Dynamics 365 for Outlook** | |
| Perform checks as new email is received | Default: Yes. If Yes, email is checked for tracking as soon as it arrives. |
| Promote incoming email every | Default: 10 minutes. Looks for and links incoming email on the specified interval. |
| Send pending Dynamics 365 email every | Default: 10 minutes. Sends pending Dynamics 365 email on the specified interval. |
| **Set whether users can schedule synchronization in Dynamics 365 for Outlook** | |
| Users can schedule synchronization | Default: Yes. If Yes, users can set whether or not Dynamics 365 for Outlook synchronizes with Dynamics 365. |
| Minimum Time between synchronizations | Default: 15 minutes. Synchronizes Dynamics 365 for Outlook and Dynamics 365 on the specified interval. |
| **Set whether users can update their local data in the background in Dynamics 365 for Outlook** | |
| Users can schedule background local data synchronization | Default: Yes. If Yes, users can update the data that is stored on their computer to use offline. |

| SETTINGS | DESCRIPTION |
|---|---|
| Minimum time between background local data synchronizations | Default: 15 minutes. Local data is synchronized with Dynamics 365 on the specified interval. |
| **Set schedule for address book synchronization in Dynamics 365 for Outlook** | |
| Users can schedule background address book synchronization | Default: Yes. If Yes, users can update the address book that is stored on their computer to use offline. |
| Minimum time between address book synchronizations | Default: 1 hour. The local address book is synchronized with Dynamics 365 on the specified interval. |
| **Set whether users see Microsoft Dynamics 365 message** | |
| Users see “Get Dynamics 365 for Outlook” option displayed in the message bar | Default: Yes. If Yes, the **Get Dynamics 365 for Outlook** button is displayed in Dynamics 365. |

# System Settings dialog box - Reporting tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to configure reporting settings for Dynamics 365.

## Open the Reporting System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose **System Settings** > **Reporting** tab.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Specify report categories** | Default categories:<br><br>- Sales reports<br>- Service reports<br>- Marketing reports<br>- Administrative reports **Note:** If you add a new category or change existing categories, you should also change the default views available for the Report record type. Otherwise, users won't have a way to see all reports in the new categories. |
| Default value | Unassigned. Select the default report category. |
| **Set whether users can embed Power BI visuals** | |
| Allow Power BI visualization embedding | Lets users embed Power BI for Office 365 visualizations on their personal dashboards. A Power BI visualization is a snapshot of the user's data, such as a chart, map, or aggregate number. More information: Add or edit Power BI visualizations on your dashboard.<br><br>Default value: No. Users cannot embed Power BI visualizations on their personal dashboards. |

### See also

Use Power BI with Microsoft Dynamics 365
System Settings dialog box - General tab

# System Settings dialog box - Goals tab

10/11/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Set the duration and frequency of the automatic rollup of goals. These settings only affect the automatic handling of all goals set in Dynamics 365. You can always perform a manual rollup for any goal at any time.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. If you are using a Sales web application, go to **Settings** > **Administration** > **System Settings**, and then select the **Goals** tab.

   OR

   If you are using the Sales Hub App, select the Site map icon , then select ellipsis , then select **App Settings**, and then select **Goals Settings**.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Set the roll-up expiration time and the roll-up frequency.** | |
| Days after the goal end date when the rollup will stop | Default: 30 days. Set the number of days after the ending date of a goal for Dynamics 365 to stop including a goal in a rollup. |
| Roll-up recurrence frequency | Default: 24 hours. Set the number of hours between each goal rollup. |

## See also

Administrator and Sales Manager Guide
Progress Against Goals report

# System Settings dialog box - Sales tab

10/11/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x

Use the settings on this page to configure system-level settings for the sales area of Dynamics 365.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.

2. If you are using a Sales web application, go to **Settings** > **Administration** > **System Settings**, and then select the **Sales** tab.

   OR

   If you are using the Sales Hub App, select the Site map icon , then select ellipsis , then select **App Settings**, and then select **Product Catalog Settings**.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Select whether products should be created in the active state** | |
| Create products in active state | To set the products to active state by default after creation, click **Yes**. This option applies only to products that don't have a parent product family. To create products in the Draft state, click **No**. |
| **Set whether the default pricelist for an opportunity should be selected via an inbuilt rule** | |
| Allow selection of default pricelist for opportunity via inbuilt rule | Click **Yes** if you want the default price list to be selected for an opportunity based on the inbuilt rule (based on the default price lists defined for territories). Otherwise, click **No**. |
| **Set maximum number of products in a bundle** | |
| Maximum number of products in a bundle | Type the maximum number of products a bundle can have. |
| **Set pricing calculation preference** | |
| Use system pricing calculations | Click **Yes** to use the pricing calculations of Dynamics 365. To use custom pricing by using a plug-in, click **No**. When set to **No**, the default pricing calculations won't be done on opportunity, quote, order and invoice records. |
| **Set whether a discount is applied as a line item or per unit** | |

| SETTINGS | DESCRIPTION |
|---|---|
| Discount calculation method | Select **Per unit** if you want the pricing engine to calculate the discount based on the prices per unit instead of a line item. By default, the calculations are done on a line item-basis. *See the table below that shows the difference between the two calculations. |
| **Set maximum number of properties allowed for a product or bundle** | |
| Maximum number of properties that are allowed for a product or bundle | Type the maximum number of properties (specifications) a product or bundle can have. Product properties are added to a product family record, and all the child products and bundles under the product family inherit the properties added to the parent product family. The number specified in this setting is applied only when you publish a product or a bundle with the associated properties. |

*Table: Difference between calculations

| DISCOUNT METHOD | PRODUCT | PRICE PER UNIT | QUANTITY | DISCOUNT | AMOUNT |
|---|---|---|---|---|---|
| Line item | Product 1 | 100 | 11 | 10 | (100*11)-10=1090 |
| Per unit | Product 2 | 100 | 11 | 10 | (100-10)*11=990 |

### See also

[Set up a product catalog: Walkthrough](#)
[Create price lists and price list items to define pricing of products](#)
[Set up a discount list](#)
[Create product bundles to sell multiple items together](#)
[Use properties to describe a product](#)
[Administrator and Sales Manager Guide](#)

# System Settings dialog box - Service tab

10/6/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the Service tab in System Settings to set preferences for the customer service area, such as service level agreements and entitlements in Dynamics 365.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Select the **System Settings** > **Service** tab.

> **NOTE**
> With the Customer Engagement apps, version 9.1 release, service configuration settings in service management are available in the Customer Service Hub based on Unified Interface experience. You are recommended to manage service configuration settings using the new experience.
> In the Customer Service Hub app, go to **Service Management** and select **Service Terms** > **Service Configuration Settings** in the sitemap to access the Service configuration settings.

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Disable SLAs** | |
| Disable Service Level Agreements(SLAs) on SLA-enabled entity records | SLAs are enabled by default. You can enable or disable them for SLA-enabled entity records in your organization. For example, you might want to disable SLAs during maintenance activities or when you're importing records and you don't want the SLAs to apply to the records. To disable, select **Yes**. To enable, select **No**. **Note:** When SLAs are disabled, SLA records can still be created or modified. SLAs won't be applied to records, however. |
| **Apply SLA after manual override** | |

| SETTINGS | DESCRIPTION |
|---|---|
| Automatically apply SLA on entity record update after SLA was manually applied **Important:** For Dynamics 365 (online) organizations, this feature is available only if your organization has installed Dynamics CRM Online 2016 Update. For on-premises Dynamics 365 organizations, this feature is only available if you've updated to CRM 2016. Interested in getting this feature? Find your Dynamics 365 administrator or support person. | This setting determines if an SLA should automatically be applied to a record when an SLA is manually selected in the record's SLA field. The automatic SLA application can either be through the entitlement applied to the case(for theCase entity) or with the default SLA.<br><br>Either way, the manual SLA takes precedence over any other way of SLA application.<br><br>When set to **No**, SLAs won't be applied automatically to records after an SLA is manually applied. **Note:** For Case entity records, when both entitlement and customer, and manual SLA are changing, the manual SLA is used regardless of this setting. |
| **Select SLA Pause Status** | |
| Select the SLA enabled entity to choose status values for | Select the SLA-enabled entity you want to choose the pause status for. **Important:** This feature of enabling other entities for SLA was introduced in CRM Online 2016 Update 1 and CRM 2016 SP1. Interested in getting this feature? Find your Dynamics 365 administrator or support person |
| For the selected entity, choose the status values that SLA calculation should pause for | Select the statuses for which the SLA calculation should be paused. Double-click the statuses in the **Available Values** column. When the user sets a record to one of the pause status values you set here, Dynamics 365 pauses the SLA calculation. When the user changes the status of the case back to a status other than a pause status, Dynamics 365 updates the failure and warning time in the enhanced SLA KPIs. It also tracks the total time for which a record is in the pause status. **Important:** This feature of enabling other entities for SLA was introduced in CRM Online 2016 Update 1 and CRM 2016 SP1. Interested in getting this feature? Find your Dynamics 365 administrator or support person |
| **Automatically apply entitlement** | - Select whether to automatically apply the default customer entitlement when a case is created.<br>- Select whether to automatically apply the default customer entitlement when a case is updated and the customer, contact, or product field has changed. |

## See also

Service Manager guide (Customer Service Hub)

# System Settings dialog box - Synchronization tab

8/24/2018 • 3 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to determine how data is synchronized between Dynamics 365 and Microsoft Dynamics 365 for Outlook. For example, you can control synchronization between pairs of fields or enable or disable synchronization of additional mailing addresses, assigned tasks, or appointment attachments.

## Open the System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.
3. Choose the **System Settings** > **Synchronization** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| **Synchronize Dynamics 365 items with Outlook or Exchange** | |
| Manage **system filters** for your entire organization to determine the Dynamics 365 records that are synchronized to Outlook or Exchange folders. | This setting provides access to the **User Filters** tab in the **Synchronization Settings for Outlook or Exchange** dialog box. You may want to view this tab to see the default online synchronization filter settings for users in your organization. More information: Choose the records to synchronize between Dynamics 365 and Outlook or Exchange |
| Manage the **synchronized fields** of Outlook or Exchange items including appointments, contacts, and tasks for your entire organization. | This setting provides access to the **Synchronization Fields** tab in the **Synchronization Settings for Outlook or Exchange** dialog box. Use this tab to view how appointments, contacts, and tasks fields are mapped between Dynamics 365 and Outlook, and to change the synchronization direction or restrict synchronization for contacts and tasks fields. For example, if you want the contents of the contacts Notes field to be private, you can keep that field from synchronizing. More information: Control field synchronization between Dynamics 365 and Outlook or Exchange |
| **Manage your offline filters and take your information offline in Dynamics 365 for Outlook** | |
| Manage system **offline filters** for your entire organization to determine what Dynamics 365 data users can take with them when they go offline in Dynamics 365 for Outlook. | This setting provides access to the **User Filters** tab in the **Go Offline Settings** dialog box. You may want to view this tab to see the default offline synchronization filter settings for users in your organization. |

| SETTINGS | DESCRIPTION |
| --- | --- |
| **Configure general synchronization rules for your entire organization for appointments, contacts, and tasks** | |
| **Appointments** | |
| Synchronize appointment attachments with Outlook or Exchange | Attachments take up database space, so synchronization of appointment attachments is turned off by default. Choose the check box to turn on synchronization of attachments. **Important:** Synchronization of appointment attachments is not supported for recurring appointments or service activities. |
| **Contacts** | |
| Synchronize mailing address only in Outlook contact<br><br>Synchronize all three addresses (Business, Home, Other) in Outlook contact | By default, just one Outlook mailing address field is synchronized between Dynamics 365 and Outlook. This is sufficient for most organizations. If you want to synchronize all three Outlook mailing address fields (Business, Home, and Other fields) choose the **Synchronize all three addresses in Outlook contact** option. **Warning:** Be cautious when enabling this option as it can cause data loss in some situations if you have existing data. This is due to the remapping of the attributes for existing tracked contacts. The best practice is to do in-house testing to understand how the re-mapping affects your environment and data. In most cases, you should have the full data in one side (normally in Dynamics 365) and sync to the other side (normally Outlook or Exchange). |
| **Tasks** | |
| Synchronize tasks that are assigned in Outlook | Outlook tasks are synchronized by default, but synchronization of assigned tasks is turned off by default. Most companies don't require this feature because tasks would usually be assigned directly in Dynamics 365 by changing ownership in Dynamics 365.<br><br>You may want to enable this feature, however, if your company's business processes involve creating and sending tasks in Outlook instead of Dynamics 365. |
| **Select whether to enable syncing of resource bookings with Outlook** | |
| Synchronize resource bookings with Outlook | Turn on (off by default) to enable resource bookings (Field Service) synchronization with Dynamics 365 App for Outlook. More information: Field Resource Hub User's Guide (Field Service) |

## See also

Choose the records to synchronize between Dynamics 365 and Outlook or Exchange
Control field synchronization between Dynamics 365 and Outlook or Exchange

# System Settings dialog box - Mobile Client tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to...

## Open the System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.
3. Choose the **System Settings** > **Mobile Client** tab.

> **NOTE**
> - In Dynamics 365, version 8.2, the tab is **Mobile**.
> - At the time of writing, Dynamics 365, version 9.0.1 does not have this setting. Version 9.0.2 does.

| SETTINGS | DESCRIPTION |
|---|---|
| **Set conflict detection for mobile offline synchronization** | |
| Enable conflict for mobile offline synchronization | If Yes, sync conflict detection will be enabled during the play back of actions after an offline device comes back online. If No, the default, no conflict detection is done while playing back actions after an offline device comes back online. The changes done offline will overwrite any changes done in Dynamics 365. For more information, see "Sync conflict resolution" in Work offline with Dynamics 365 for phones and tablets |

# System Settings dialog box - Previews tab

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Use the settings on this page to enable preview features in Dynamics 365.

## Open the System Settings dialog box (if it's not already open)

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**.

3. Choose the **System Settings** > **Previews** tab.

| SETTINGS | DESCRIPTION |
|---|---|
| These preview features are intended to be used for development and testing purposes only. | |
| I have read and agree to the license terms | After agreeing to the license terms, check this box to allow you to enable preview features. |
| **Action Step Support for Business Process Flows Preview** | |
| Enable Action Step Support for Business Process Flows Preview | More information: Business process flows overview |
| **Organization Insights Preview** | |
| Enable Organization Insights Preview | More information: Preview feature: Use the Organization Insights dashboard to view metrics about your instance |
| **Text Analytics Preview for Case Topic analysis, Suggest Similar Cases and Suggest Knowledge Articles** | |
| Enable the Dynamics 365 Text Analytics Preview | More information: Public Preview: Topic analysis |
| **Sales Insights** | |
| Install Relationship Analytics to enable it for preview | More information: Preview feature: Get insights on opportunities, activities, and leads of customers |

### See also

What are Preview features and how do I enable them?

# On-off switch for Learning Path (guided help)

8/24/2018 • 2 minutes to read • Edit Online

Applies to Dynamics 365 (online), version 9.x
Applies to Dynamics 365 (online), version 8.x

Learning Path (guided help) is turned on by default, but is easy to turn off.

## Turn Learning Path on or off for an individual user

This setting affects only the person who makes this change.

- To turn Learning Path off: On the nav bar, click the **Options** icon > **Opt out of Learning Path**.
- To turn Learning Path on: On the nav bar, click the **Options** icon > **Opt in for Learning Path**.

## Turn Learning Path on or off for an entire organization

This setting changes access to Learning Path for an entire organization.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role

   a. Follow the steps in View your user profile.

   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Administration**..
3. On the **Administration** page, click **System Settings**.
4. On the **General** tab, scroll down to the **Set custom Help URL** section. Next to **Enable Learning Path**, select **Yes** or **No**.

## Privacy notice

By enabling the Learning Path feature, static html, you enable images and scripts to be stored on Azure Content Delivery Network (CDN). In addition, all dynamic content that is displayed will be stored in Azure Redis Cache, which is used to pre-cache from the Azure SQL database.

An administrator can enable and disable use of the Learning Path feature within a Dynamics 365 (online) instance by using the Enable Guided Help setting in the Dynamics 365 organization.

Azure components and services that are involved with Learning Path functionality are detailed in the following sections.

> **NOTE**
> For more information about additional Azure service offerings, see the Microsoft Azure Trust Center.

Cloud Services

**Learning Path runtime (Web Role)**

This is the web application that serves the content to users.

**Learning Path service (Worker Role)**

Worker role is responsible for processing the data from Azure SQL Database and caching them into Azure Redis Cache.

Azure SQL Database

Learning Path uses SQL Database to store:

- Content
- Content metadata
- System metadata

  Azure Blob Storage

  The HTML, images, JavaScript, and CSS are all stored in Azure Blob storage.

  Azure Content Delivery Network (CDN)

  Learning Path uses Azure Content Delivery Network to serve static content to the survey runtime, such as HTML, images, JavaScript, and CSS.

  Azure Active Directory

  Learning Path uses Azure Active Directory Service to authenticate web services specifically for the designer. Currently the designer is not exposed to customers and partners. And hence the authentication is within only the Microsoft domain.

  Azure Redis Cache

  Learning path uses Azure Redis Cache to cache dynamic content that we serve to users.

  Azure Traffic Manager

  Learning Path uses Traffic Manager to improve the availability of important applications by monitoring your Azure or external sites and services and automatically directing users to a new location anytime there's a failure.

  Azure Resource Manager

  Learning Path uses Azure Resource Manager to deploy CDN, Redis Cache, SQL Database, and cloud services as resource groups so that they are in a consistent state and can be deployed repeatedly.

**See also**

Create your own guided help (Learning Path) for your customers
Video: Learning Path in-app Help designer for customers and partners