



# Microsoft Dynamics CRM

## Resource Guide 2016

# Here for you



Whether you have a quick question, or a sticky problem to solve, Microsoft has the solutions you seek. We offer a full range of self-help and assisted support resources designed to provide answers – fast!

In addition, our online and face-to-face community

resources connect you with tens of thousands of Microsoft Dynamics CRM customers and partners who are eager to swap stories, share ideas and help solve challenges. These communities are a fun and inspiring way to get to know other Microsoft Dynamics CRM users.

Together, these self-service, assisted and community-based resources can shorten learning curves, promote user adoption and help maximize your investment. We encourage you to explore the many options outlined in this resource guide, then hold on to it as a handy reference.



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# Self-Service Support Resources



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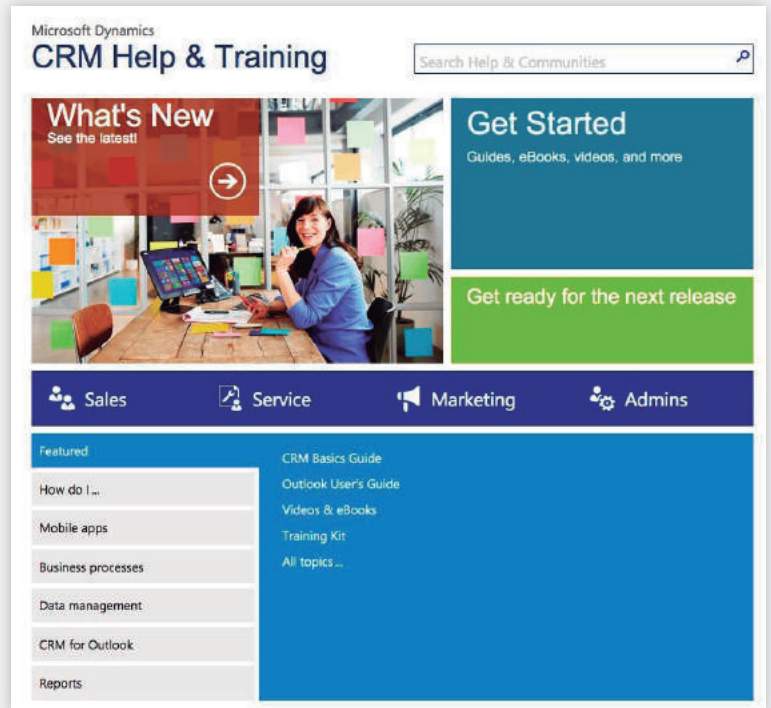


# Help & Training

Microsoft's self-service resources are available 24x7 for times when you need just a little extra help or guidance.

Enjoy a 24/7 all-access pass to the CRM Help & Training site, a central location for all the eBooks, videos and help topics you need to make the most of your investment.

Go to [CRMhelpandtraining.com](http://CRMhelpandtraining.com)



Microsoft Dynamics Help & Training is your place to:



Find great "getting started" content & videos to learn about CRM features



See what's new with Microsoft Dynamics CRM



Get ready for the next release



Utilize ready-for-you-to-customize **training materials and templates**



Access key contact information for when you need help via the **CRM Help Center**

# Customer Service Quick Reference Card

We have included this quick reference card to assist your customer care representatives in getting started with case management.

Create, edit and resolve service cases. [Get the quickref card.](#)

## Microsoft Dynamics CRM Quick Reference for a Customer Care Representative

### Create a new case

A customer care representative can easily create and manage cases using Microsoft Dynamics CRM

1. Go to **Service > Cases**. (How do I get there?)
2. Choose **New Case**. For a phone support case, choose **Phone Support**.
3. On the form, enter the case information.

The screenshot shows the Microsoft Dynamics CRM interface for a case titled "Missing parts (sample)". The interface includes a top navigation bar with buttons for "NEW", "CREATE CHILD CASE", "CANCEL CASE", "APPLY ROUTING RULE", "ADD TO QUEUE", "QUEUE ITEM DETAILS", and "ASSIGN". A "Resolve Case" button is highlighted with a red box. The main content area is divided into several sections: "CASE DETAILS" (Customer, Case Title, ID, Subject, Origin, Enrollment, Submitter, Product), "DESCRIPTION", "APPLICABLE SLA", "Case Relationships" (Similar Cases, Merged Cases, Child Cases), "CUSTOMER DETAILS", and "RECENT CASES".

Annotations with arrows point to various features:

- Cancel a case**: Points to the "CANCEL CASE" button.
- Add a case to a queue**: Points to the "ADD TO QUEUE" button.
- Assign a case to someone else**: Points to the "ASSIGN" button.
- Resolve a case**: Points to the "Resolve Case" button.
- Select the account or customer and enter the case title**: Points to the "Customer" field in the Case Details section.
- Add case activities**: Points to the "ACTIVITIES" tab and the "Add Phone Call" button.
- See what kind of support the customer is entitled to**: Points to the "SLA" section.
- Look for similar cases**: Points to the "SIMILAR CASES" section.
- View merged cases**: Points to the "MERGED CASES" section.
- View or add child cases**: Points to the "CHILD CASES" section.

# Customer Service Quick Reference Card

## Resolve a case

1. Choose RESOLVE CASE

2. Fill in the required information

3. Choose Resolve

## Assign a case to someone else

Find and open the case you'll like to assign

1. Choose Assign

2. Select who you want to assign the case to

3. Choose Assign



# eBooks, CRM Videos Implementation & Administration, Customization & Development



## eBooks

Check out these short, user-friendly, visual guides to key areas, including CRM basics, what's changed in CRM 2016, business processes and more. [Go to CRM eBooks.](#)



## CRM Videos

In two minutes or less, watch short videos to get started with service, mobile, and online license management, and to learn about the new navigation in Dynamics CRM 2016. Find more videos on the [Microsoft Dynamics CRM channel](#) on YouTube.



## Implementation & Administration

**CRM Online Onboarding Success – Step by step** guidance for customers to onboard their organization and users on CRM Online. Includes new tools such as a licensing calculator to help determine the requirements of CRM licenses, instances and storage and a deployment planning guide to enable proactive planning.

**Deploying and Administering CRM Online and CRM 2016 (on-premises)** – Get detailed info to install, configure, customize and maintain Dynamics CRM 2016. For IT pros and CRM admins.

**CRM Training and Adoption Kit** – Download editable eBooks that you can customize any way you like. Feel free to leverage some of our Dynamics CRM 2016 content for your training and readiness needs.

**Get Ready for the Next Release** – New features are continually becoming available! If you administer, configure or install Microsoft Dynamics products and services, watch this page for information about on going releases and how to prepare your organization.

**After You Update to CRM 2016: Next steps web page** - Quickly access links to info about important steps to take to get the most out of the new features and tools.

**CRM Setup & Administration** – For help in deploying and administering Microsoft Dynamics CRM.



## Customization & Development

**Developer Center** – To get the info you need to develop, design and distribute solutions for Microsoft Dynamics CRM.

**CRM 2016 Microsoft Dynamics CRM SDK** – View the Software Development Kit (SDK) online, or **download** all the SDK docs in the MSDN library, plus hundreds of code samples in C# and Visual Basic .NET, tools to register plug-ins, and a design guide for solutions.

**CRM 2016 Logical Entity Diagrams**- Check out these Visio diagrams that show Dynamics CRM 2016 entity relationships.





# Assisted Support Resources

For questions and issues where you need extra assistance, the **Microsoft Dynamics CRM customer support team** is available to help you.

## Our Commitment to You.

1. Serving our customers is our #1 priority
2. We take pride in being responsive and friendly to work with

Please remember, when contacting technical support, the more information you can provide, the faster we can help resolve your issue

Having the right support plan is crucial to your success and our ability to support you. Please ensure you discuss with your Customer Success Manager the best support plan for your solution and organization.

## Tiered support plans are available for every business type.

### SUBSCRIPTION

For basic support

- Get responses to technical support calls within one business day
- Maximize uptime with unlimited break/fix support
- Find help quickly from an online community of experts and peers
- Start with Getting Started catalogue, self-help guides
- Access self-directed support on our customer portals

### ENHANCED

For fast response

- Initial response time of less than two hours for your most critical issues
- Eliminate on-hold time with priority routing
- Maximize uptime with unlimited break/fix support
- Find help quickly from an online community of experts and peers
- Self-learning resources available 24 hours and for Dynamics CRM Online a full ELearning catalog\*
- Access self-directed support on our customer portals

### PROFESSIONAL DIRECT

Priority handling and skill building

- Initial response time of less than two hours for your most critical issues
- Receive 24x7 support for your most critical issues
- Receive expert advice, escalation assistance and much more from service delivery managers
- Eliminate on-hold time with priority routing
- Maximize uptime with unlimited break/fix support
- Find help quickly from an online community of experts and peers
- Access self-directed support on our customer portals, plus ELearning and customizable training materials

### PREMIER

For complex business/critical applications

- Initial response time of less than two hours for your most critical issues
- Receive 24x7 support for your most critical issues
- Receive expert advice, escalation assistance and much more from service delivery managers
- Eliminate on-hold time with priority routing
- Maximize uptime with unlimited break/fix support
- Find help quickly from an online community of experts and peers
- Access self-directed support on our customer portals, plus ELearning and customizable training materials
- Dedicated, customized and proactive support w/ dedicated account manager, proactive services, mentoring and on-site services





# Contact a technical support specialist for CRM Online

Assisted care whenever you need it.

⦿ If your sign-in looks like this: **"youremail@yourorg.onmicrosoft.com"** – your users should first contact your CRM/site administrator(s) for assistance.

⦿ If your administrator(s) would like to contact a **Microsoft technical support specialist** for help, you have a few options:



**Online** (recommended) –  
<https://portal.office.com>



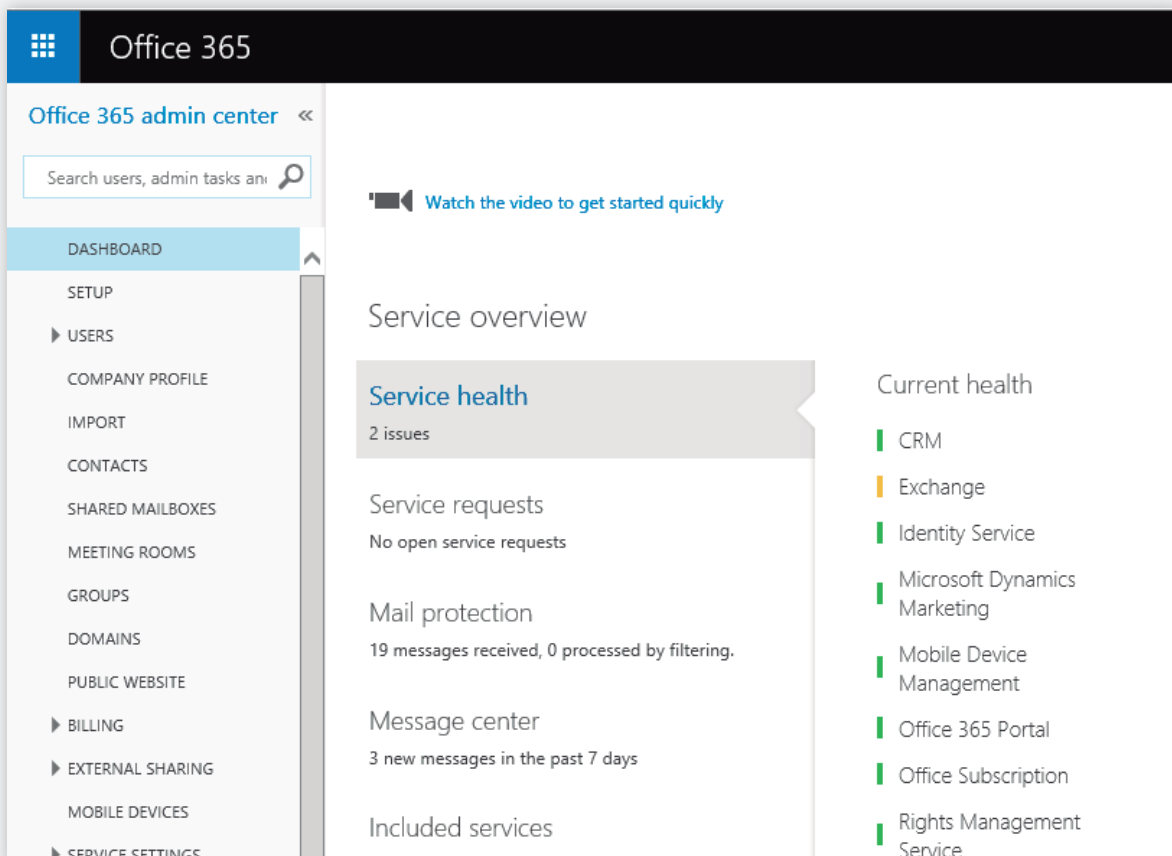
**Phone** – 1-800-865-9408

⦿ Before submitting a support case make sure to check the **Service Health Dashboard** for known issues.

⦿ You may also try our **self-help /troubleshooting**

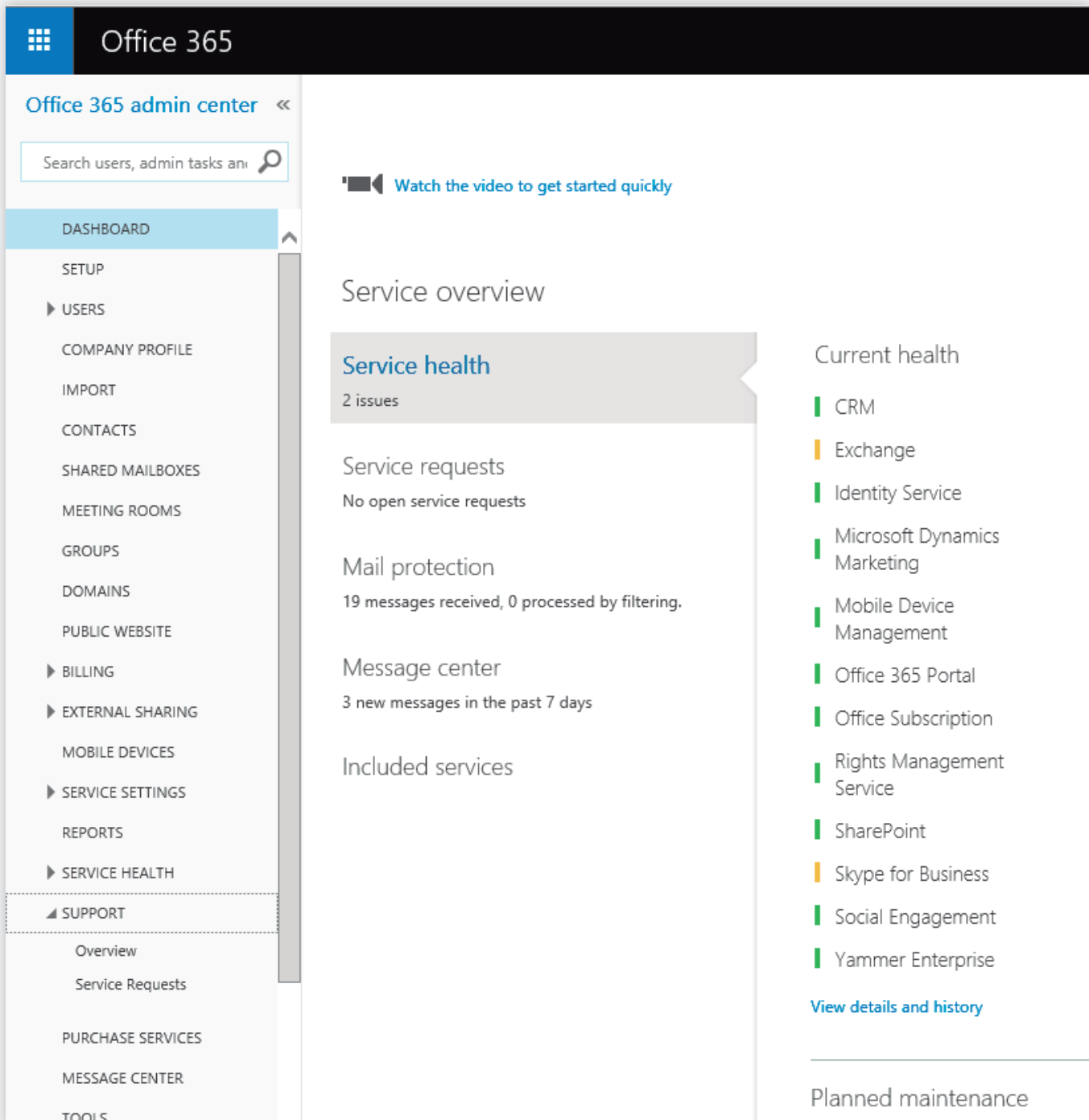
⦿ If you are working with a Microsoft partner for support, your request process may be different and you will be prompted to contact your partner via email or phone.

*Note: Your screen view experience may vary*



The screenshot shows the Office 365 admin center interface. The top navigation bar includes the Office 365 logo and the text "Office 365". Below this is the "Office 365 admin center" header with a search bar for users and admin tasks. A left-hand navigation menu lists various administrative sections: DASHBOARD, SETUP, USERS, COMPANY PROFILE, IMPORT, CONTACTS, SHARED MAILBOXES, MEETING ROOMS, GROUPS, DOMAINS, PUBLIC WEBSITE, BILLING, EXTERNAL SHARING, MOBILE DEVICES, and SERVICE SETTINGS. The main content area is titled "Service overview" and features a "Service health" section with a "2 issues" indicator. Below this are sections for "Service requests" (No open service requests), "Mail protection" (19 messages received, 0 processed by filtering), "Message center" (3 new messages in the past 7 days), and "Included services". On the right side, there is a "Current health" section listing various services with their status: CRM, Exchange, Identity Service, Microsoft Dynamics Marketing, Mobile Device Management, Office 365 Portal, Office Subscription, and Rights Management Service.

# Select Support > Service Requests



The screenshot displays the Office 365 admin center interface. The top navigation bar shows the Office 365 logo and the text "Office 365". Below this, the "Office 365 admin center" header is visible, along with a search bar for users and admin tasks. The left-hand navigation pane lists various administrative categories, with "SUPPORT" expanded to show "Service Requests" as the selected option. The main content area features a "Service overview" section with a "Service health" card indicating 2 issues. Below this, there are sections for "Service requests" (No open service requests), "Mail protection" (19 messages received, 0 processed by filtering), and "Message center" (3 new messages in the past 7 days). On the right side, a "Current health" list shows the status of various services, including CRM, Exchange, Identity Service, Microsoft Dynamics Marketing, Mobile Device Management, Office 365 Portal, Office Subscription, Rights Management Service, SharePoint, Skype for Business, Social Engagement, and Yammer Enterprise. A "View details and history" link is provided below the list. At the bottom of the main content area, the "Planned maintenance" section is partially visible.

Office 365

Office 365 admin center <<

Search users, admin tasks and...

DASHBOARD

SETUP

USERS

COMPANY PROFILE

IMPORT

CONTACTS

SHARED MAILBOXES

MEETING ROOMS

GROUPS

DOMAINS

PUBLIC WEBSITE

BILLING

EXTERNAL SHARING

MOBILE DEVICES

SERVICE SETTINGS

REPORTS

SERVICE HEALTH

SUPPORT

Overview

Service Requests

PURCHASE SERVICES

MESSAGE CENTER

TOOLS

Watch the video to get started quickly

Service overview

Service health

2 issues

Service requests

No open service requests

Mail protection

19 messages received, 0 processed by filtering.

Message center

3 new messages in the past 7 days

Included services

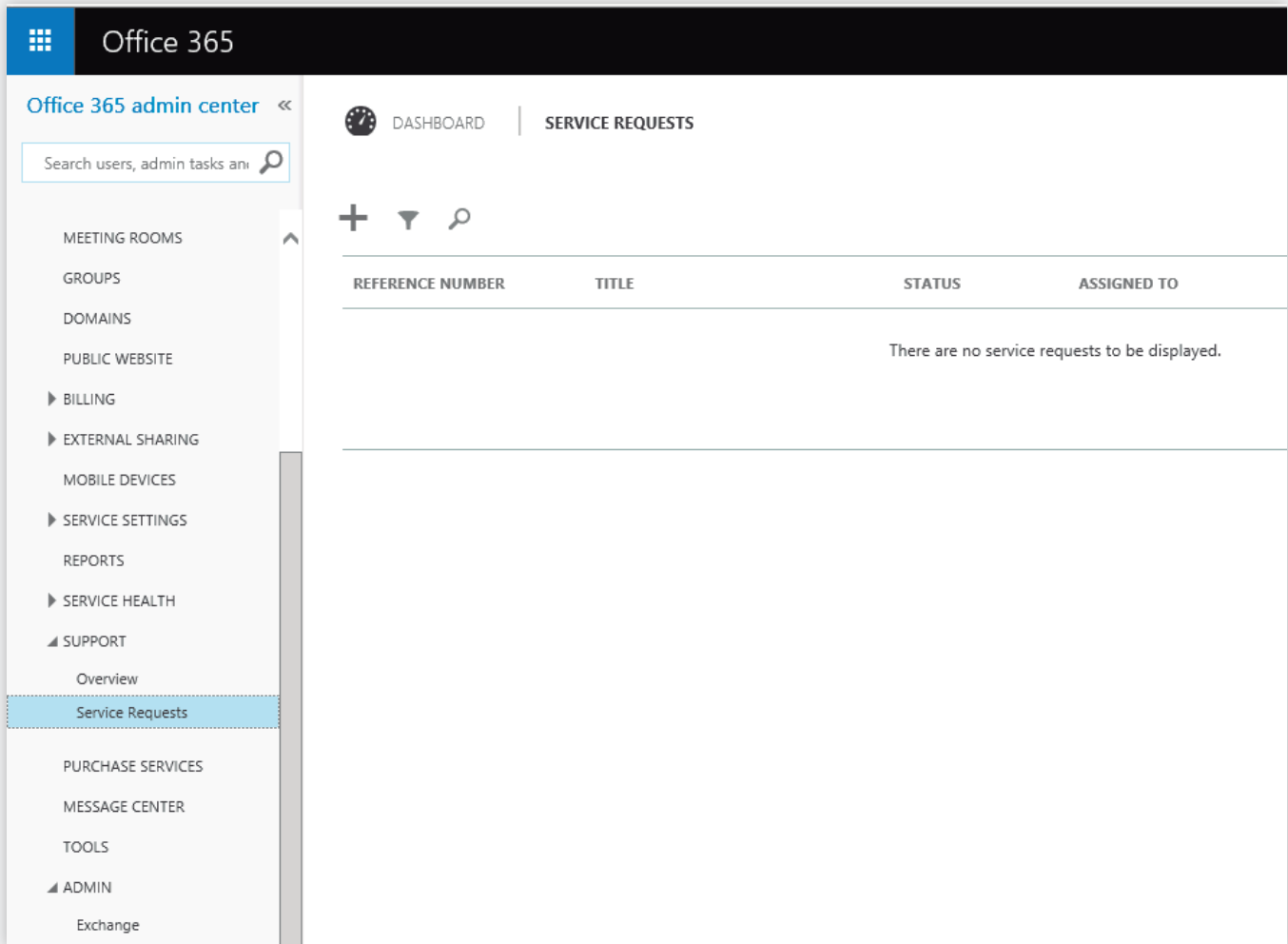
Current health

- CRM
- Exchange
- Identity Service
- Microsoft Dynamics Marketing
- Mobile Device Management
- Office 365 Portal
- Office Subscription
- Rights Management Service
- SharePoint
- Skype for Business
- Social Engagement
- Yammer Enterprise

[View details and history](#)

Planned maintenance

# Click the plus button



Office 365

Office 365 admin center <<

Search users, admin tasks and... 🔍

- MEETING ROOMS
- GROUPS
- DOMAINS
- PUBLIC WEBSITE
- ▶ BILLING
- ▶ EXTERNAL SHARING
- MOBILE DEVICES
- ▶ SERVICE SETTINGS
- REPORTS
- ▶ SERVICE HEALTH
- ▲ SUPPORT
  - Overview
  - Service Requests**
- PURCHASE SERVICES
- MESSAGE CENTER
- TOOLS
- ▲ ADMIN
  - Exchange

DASHBOARD | SERVICE REQUESTS

+ 🔍

REFERENCE NUMBER	TITLE	STATUS	ASSIGNED TO
There are no service requests to be displayed.			



# Select More > Service Requests

The screenshot shows the Microsoft Service Health dashboard. On the left, a navigation pane is expanded to 'SUPPORT' > 'Service Requests'. The main content area displays a list of services with their status and a 'More...' link at the bottom.

Service	Status
Outlook, e-mail, calendar, tasks, shared resources	No issues
Online collaboration Skype for Business, video conferencing, screen sharing, IM	No issues
Sites and document sharing SharePoint, OneDrive for Business, search	No issues
Office client subscription Word, Excel, PowerPoint, OneNote	No issues
Visio Pro Diagrams, flowcharts	No issues
Project Pro Projects, teams, resources	No issues
Yammer Enterprise Social network, enterprise collaboration	No issues
Mobile Device Management	No issues
Office 365 Portal	No issues
Office Subscription	No issues
Rights Management Service	No issues
SharePoint	No issues
Skype for Business	Service degraded
Social Engagement	No issues
Yammer Enterprise	No issues

Issues detected

- Update IP address lists to avoid service interruption to Yammer

[View details and history](#)

[More...](#)

# Select Dynamics CRM Online


The screenshot shows the Microsoft Service Health dashboard. On the left, a navigation pane is expanded to 'SUPPORT' > 'Overview'. The main content area displays a list of services with their status and a 'Less...' link at the bottom.

Service	Status
Identity management Active Directory, multi-factor, single sign-on	No issues
User and domain management Users, groups, domains, sign-on	No issues
Delve Discover, search and connect	No issues
Dynamics CRM Online Sales, marketing, customer care	No issues
Mobile device management Device security policies, access settings, wipe	No issues

[Less...](#)

[See all support tickets](#)

# Complete form

 Office 365

New service request

- 1. Identify the issue**
2. Review suggestions
3. Add details
4. Confirm and submit


identify the issue

\* Feature:

\* Symptom:

Next [Cancel](#)

 Office 365

New service request


- 1. Identify the issue**
2. Review suggestions
3. Add details
4. Confirm and submit

identify the issue

\* Feature:

- Connectors for Microsoft Dynamics
- Customization and Solutions
- Data Management
- E-mail Router
- Marketing
- Online Service Availability
- Programmability and Software Development Kit (SDK)
- Reports, Charts and Dashboards

# Complete form

 Office 365

New service request

- 1. Identify the issue**
2. Review suggestions
3. Add details
4. Confirm and submit

## identify the issue

\* Feature:

CRM Client for Microsoft Office Outlook

\* Symptom:

Outlook synchronization

\* Issue summary

*Summarize your issue in one sentence.*

\* Issue details

*In a few sentences, tell us what's going on. It's helpful if you include the steps to re-create the issue.*



# Complete form

☰ Office 365

## New service request

1. Identify the issue
- 2. Review suggestions**
3. Add details
4. Confirm and submit

## review suggestions

We've found some things that might help...

**CRM Integration with Office 365, Benefits and Installation ...**

CRM Integration with Office 365, ... customer testimonial from BioMedix describing the value of using a joint Office 365 and Microsoft Dynamics CRM Online ...

**Troubleshooting Microsoft Dynamics CRM for Outlook installation, configuration, and upgrade**

TechNet Library. Microsoft Dynamics ... Choose Start > All Programs > Microsoft Dynamics CRM 2015 > Diagnostics > Synchronization Troubleshooting ... Contact Us ...

**Outlook 2007 won't connect - Microsoft Office 365 Community**

Microsoft Office 365 Community Forums Email and calendar Outlook 2007 won't connect. ... the service that Outlook uses to communicate to Office 365) ...

**Office 365 DIY Troubleshooter – self-help technical ...**

Need to configure, troubleshoot or understand a part of Office 365? We have lots of articles and tools to help but finding them can be difficult.

**Outlook 2007 hangs - Microsoft Office 365 Community**

Since we migrated to O365 we have had a number of people report that their Outlook ... to Office 365. I won't be the ... Outlook /safe \*does not\* stop the CRM add ...

**Using Office 365 Outlook/ adding domain. | Office ...**

Microsoft Office 365 Community Forums Office applications Using Office 365 Outlook/ adding domain. ... Using Office 365 Outlook/ adding domain.


Do you still need to create a service request?

Back

Yes, continue

No, cancel request

# Complete form

 Office 365

## New service request

1. Identify the issue
2. Review suggestions
- 3. Add details**
4. Confirm and submit

### add details

\* Is your service unavailable?

\* How many users are affected?

Enter an email address of someone affected by this issue:

To help the support representative resolve problems better, you can attach up to five screen shots or other documents to this request. Each file must be smaller than 5 MB in size.

[Attach a file](#)

# Best Practices for Working with Microsoft Support



Whenever you contact Technical Support, the more information you provide upfront, the faster we can help resolve your issue.



Provide details such as:

- Is the issue affecting all users?
  - If not, how many users are being affected?
  - Which roles are being affected?



Our Commitment to You:

- Serving you, our customer, is our #1 priority
- We take pride in being friendly, responsive and easy to work with



# Community-Based Resources



Microsoft  
Dynamics CRM  
Community

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Dynamics CRM  
User Group  
(CRMUG)

[page 19](#)



CRM Support  
Team Blog

[page 20](#)



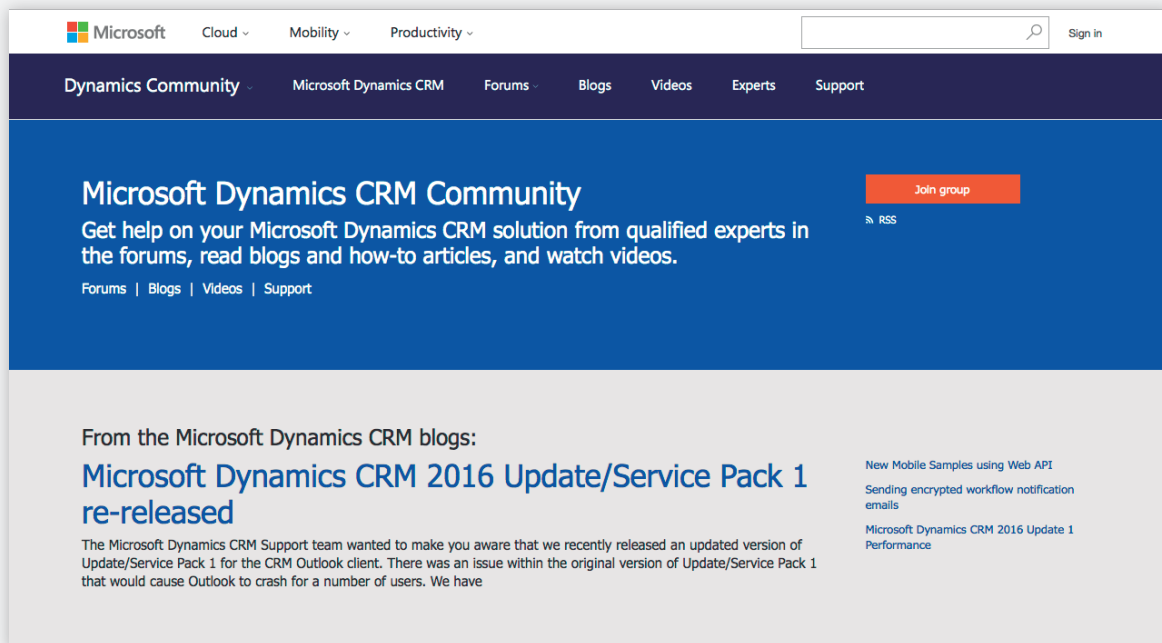
Social Media  
Sites

[page 20](#)

# Microsoft Dynamics CRM Community

Swap tips and share ideas, face-to-face or online, with other users and Microsoft Dynamics professionals in our many communities.

Go to <http://community.dynamics.com/crm/default.aspx>



The screenshot shows the Microsoft Dynamics CRM Community website. At the top, there is a navigation bar with the Microsoft logo, links for Cloud, Mobility, and Productivity, a search box, and a Sign in button. Below this is a dark blue header with 'Dynamics Community' and links for Microsoft Dynamics CRM, Forums, Blogs, Videos, Experts, and Support. The main content area has a blue background with the title 'Microsoft Dynamics CRM Community' and a 'Join group' button. Below the title is a description: 'Get help on your Microsoft Dynamics CRM solution from qualified experts in the forums, read blogs and how-to articles, and watch videos.' There are also links for Forums, Blogs, Videos, and Support. Below this is a section titled 'From the Microsoft Dynamics CRM blogs:' featuring a blog post titled 'Microsoft Dynamics CRM 2016 Update/Service Pack 1 re-released'. The post text states: 'The Microsoft Dynamics CRM Support team wanted to make you aware that we recently released an updated version of Update/Service Pack 1 for the CRM Outlook client. There was an issue within the original version of Update/Service Pack 1 that would cause Outlook to crash for a number of users. We have'. To the right of the blog post are two RSS feeds: 'New Mobile Samples using Web API' and 'Microsoft Dynamics CRM 2016 Update 1 Performance'.

The Dynamics CRM Community is your place to:



Learn from the experts, and share your expertise!



Exchange ideas with other users



Hear the latest news from Microsoft



Read blogs from Microsoft and our CRM Partners, including the Dynamics CRM Support Team



Watch great videos all about CRM!

# CRMUG

The more you know about Microsoft Dynamics CRM, the more it can help you grow your business. **The Dynamics CRM User Group (CRMUG)** will help you become more proficient with Microsoft Dynamics CRM by giving you opportunities to connect, **learn and share experiences with others who use the product the same way you do.** The CRM User Group (CRMUG) is an independent, user-driven organization designed to help Dynamics CRM users connect with each other and share knowledge, experience and training. You can engage with the CRMUG in a variety of ways, including **live and virtual events, online communities, discussion forums, regional networking opportunities and numerous training courses.**

[Go to www.crmug.com](http://www.crmug.com)



The screenshot shows the CRMUG website homepage. On the left is a navigation menu with items: Home, JOIN TODAY, Membership, Chapters, Conferences, Learn & Engage, Communities, News & Resources, and About Us. Below the menu are social media icons for Facebook, Twitter, LinkedIn, YouTube, and Email. The main content area features the CRMUG logo and the tagline "Boosted Confidence, Competence and Connections. Guaranteed." Below this is a welcome message: "Welcome to the Dynamics CRM User Group (CRMUG). CRMUG provides a hub for thousands of CRM user, partners and developers to exchange knowledge on how to best maximize product performance to achieve business success. Our resourceful community is powered by users, for users and specializes in the delivery of member-driven education and enriched networking - helping to boost competencies, confidence levels and connections for our members." A "GENERAL DISCUSSIONS" section follows, with the text "Same-day counsel. Real-time resolutions. Self-sufficient performance." Below this is a forum post by Gayan Perera, titled "RE: Migrate Data From Business Contact Manager...", with the text "We've moved couple of BCM clients to CRM, what we did was to restore the BCM database to a SQL server...". On the right, there is a "Local Chapter Meetings" section with an image of a meeting and a "FIND A MEETING" button. The text below the image says "Engage with users who live and work near you. Find your next Chapter meeting and connect with your online community."



# CRM Online Blogs

## CRM Support Team Blog:

Go to <http://community.dynamics.com/crm/b/dynamicscrmsupportblog/archive/2012/08/03/welcome-to-the-dynamics-crm-support-blog.aspx>

## The Support Team Blog will provide you:

- Insight from **the best CRM Support Engineers in the world**
- **Key “tips-n-tricks”** Support uses to resolve common issues
- Updates on **current support issues**

## Social Media Sites

