



Microsoft Dynamics CRM Resource Guide 2015

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 onto it as a handy reference.

Self-Service
Support
Resources

page 2

Assisted
Support
Resources

page 7

Community-
Based
Resources

page 12

Self-Service Support Resources



Help & Training
page 3

Customer
Service Quick
Reference Card
page 4

CRM eBooks
page 6

CRM Videos
page 6

Implementation
& Administration
page 6

Customization
& Development
page 6



Help & Training

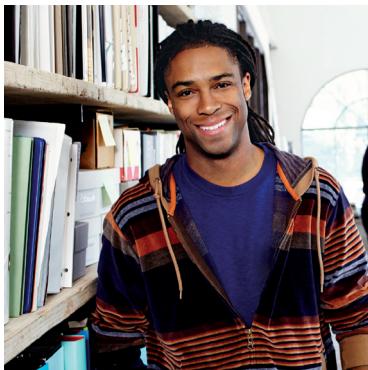
Microsoft's self-service resources are available 24x7 for times when you need just a little extra help or guidance.

The screenshot shows the Microsoft Dynamics CRM Help & Training homepage. At the top, there is a search bar labeled "Search Help & Communities". Below the search bar, there are two main sections: "What's New" (with a link to "See the latest!") and "Get Started" (with a link to "Guides, eBooks, videos, and more"). A banner below "Get Started" says "Get ready for the next release". Below these sections, there are four navigation links: Sales, Service, Marketing, and Admins. On the left side, there is a sidebar titled "Featured" with links to "How do I...", "Mobile apps", "Business processes", "Data management", "CRM for Outlook", and "Reports". To the right of the sidebar, there is a list of links: "CRM Basics Guide", "Outlook User's Guide", "Videos & eBooks", "Training Kit", and "All topics ...".

Enjoy 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.

The Microsoft Dynamics Help & Training is your place to:

- Get ready for the next release
- See **what's new** with Microsoft Dynamics CRM
- Find great "**getting started**" **content & videos** to learn about CRM features
- Ready-for-you-to-customize [training materials and templates](#)
- Access **key contact information** for when you need help via the [CRM Help Center](#)



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

Customer Service Quick Reference Card

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 Case form. A callout box on the left says "Select the account or customer and enter the case title". Arrows point from various UI elements to specific features:

- "Cancel a case" arrow points to the "CANCEL CASE" button.
- "Add a case to a queue" arrow points to the "ADD TO QUEUE" button.
- "Assign a case to someone else" arrow points to the "ASSIGN" button.
- "Resolve a case" arrow points to the "Resolve Case" button.
- "Add case activities" arrow points to the "ACTIVITIES" tab.
- "See what kind of support the customer is entitled to" arrow points to the "Entitlement" section.
- "Look for similar cases" arrow points to the "SIMILAR CASES" section.
- "View merged cases" arrow points to the "MERGED CASES" section.
- "View or add child cases" arrow points to the "CHILD CASES" section.



Resolve a case

1. Choose **RESOLVE CASE**

2. Fill in the required information

3. Choose **Resolve**

Resolve Case

Provide information in the following boxes to resolve this case.

Resolution Type * Problem Solved

Resolution * issue resolved

Total Time 0 minutes

Billable Time * 5 minutes

Remarks Power has been restored.

Resolve Cancel

Assign a case to someone else

- Find and open the case you'd like to assign.

1. Choose **Assign**.

2. Select who you want to assign the case to

3. Choose **Assign**

CANCEL CASE APPLY ROUTING RULE ADD TO QUEUE QUEUE ITEM DETAILS ... Assign

Assign to Team or User

You have selected 1 item. To whom would you like to assign it?

Assign to me
Assign the selected Case to yourself.

Assign to another user or team
Assign the selected item(s) to the following user or team:

Assign Cancel



eBooks

Check out these short, user friendly, visual guides to key areas, including CRM basics, what's changed in CRM 2015, 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 2015. 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 and includes new Tools such as a Licensing calculator to help determine the right requirement of CRM licenses, instances, and storage and a Deployment planning guide to enable proactive planning.

[Deploying and Administering CRM Online and CRM 2015 \(on-premises\)](#) – Get detailed info to install, configure, customize, and maintain Dynamics CRM 2015. 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 2015 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 ongoing releases and how to prepare your organization.

[After you update to CRM 2015 – 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](#) – Go to www.CRMITProCenter.com for help to deploy and administer Microsoft Dynamics CRM.

Customization & Development

[Developer Center](#) – Go to www.CRMDeveloperCenter.com to get the info you need to develop, design, and distribute solutions for Microsoft Dynamics CRM.

[CRM 2015 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 2015 Logical Entity Diagrams](#) – Check out these Visio diagrams that show Dynamics CRM 2015 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		ENHANCED For fast response	PROFESSIONAL DIRECT Priority handling and skill building	PREMIER For Complex/Business Critical Applications	
	Get responses to technical support calls within one business day		Initial response time of less than two hours for your most critical issues		Initial response time of less than two hours for your most critical issues
	Maximize uptime with unlimited break/fix support		Eliminate on-hold time with priority routing		Receive 24x7 support for your most critical issues
	Find help quickly from an online community of experts and peers		Maximize uptime with unlimited break/fix support		Receive expert advice, escalation assistance and much more from service delivery managers
	Start with Getting Started catalogue, self-help guides		Find help quickly from an online community of experts and peers		Eliminate on-hold time with priority routing
	Access self-directed support on our customer portals		Self-learning resources available 24 hours and for Dynamics CRM Online a full ELearning catalog*		Maximize uptime with unlimited break/fix support
			Access self-directed support on our customer portals		Find help quickly from an online community of experts and peers
					Access self-directed support on our customer portals, plus ELearning and customizable training material*
					Dedicate, customized and proactive support w/ dedicated account manager, proactive services, mentoring and on-site services



Assisted care
whenever you
need it.

Contact a technical support specialist for CRM Online

- You must be an **Office 365 administrator** to contact technical support. If you aren't an administrator, contact your local administrator
- If you are an administrator and would like to contact a Microsoft technical support specialist for help, you have a few options:

Online (recommended - see the process below) –

<https://portal.office.com>

Phone – **1-800-865-9408** (North America) or [other countries/regions](#)

- Before submitting a support case make sure to check the [Service Health Dashboard](#) for known issues.
- You may also try our [self-help /troubleshooting](#)

Note: Your screen view experience may vary

The screenshot shows the Office 365 Admin Center interface. At the top, there's a navigation bar with a grid icon and the text "Office 365". Below it, the title "Office 365 admin center" is followed by a back arrow and a search bar containing "Search users, admin tasks and...". A video thumbnail with the text "Watch the video to get started quickly" is also present.

The left sidebar contains a vertical list of navigation items: DASHBOARD (selected), SETUP, ▶ USERS, COMPANY PROFILE, IMPORT, CONTACTS, SHARED MAILBOXES, MEETING ROOMS, GROUPS, DOMAINS, PUBLIC WEBSITE, and ▶ BILLING.

The main content area features a "Service overview" section with a "Service health" card showing "2 issues". It also includes cards 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).

A legend titled "Current health" on the right side lists several services with corresponding colored squares: CRM (green), Exchange (orange), Identity Service (green), Microsoft Dynamics Marketing (green), Mobile Device Management (green), and Office 365 Portal (green).

Select Support > Service Requests

The screenshot shows the Office 365 Admin Center interface. At the top, there's a navigation bar with a grid icon, the text "Office 365", and a search bar labeled "Search users, admin tasks and...". Below the search bar is a link to "Watch the video to get started quickly". On the left, a vertical sidebar menu lists various administrative categories: 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 (with "Overview" and "Service Requests" listed under it, where "Service Requests" is highlighted with a red dashed box), PURCHASE SERVICES, MESSAGE CENTER, and TOOLS.

The main content area is titled "Service overview". It features several service status cards:

- Service health**: Shows "2 issues".
- Service requests**: Shows "No open service requests".
- Mail protection**: Shows "19 messages received, 0 processed by filtering."
- Message center**: Shows "3 new messages in the past 7 days".
- Included services**: A list of services with green vertical bars to their left:
 - 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**: A link at the bottom of the included services section.
- Planned maintenance**: A section at the bottom.

Click the plus button

The screenshot shows the Office 365 Admin Center interface. The top navigation bar includes the Microsoft logo, the title "Office 365", and a search bar. Below the navigation is a dashboard with a clock icon and the text "DASHBOARD". To the right of the dashboard is a section titled "SERVICE REQUESTS". A large red box highlights the "Service Requests" link in the left sidebar under the "SUPPORT" category. The main content area displays a table with columns: REFERENCE NUMBER, TITLE, STATUS, and ASSIGNED TO. A message at the bottom of the table states, "There are no service requests to be displayed." The left sidebar also lists other categories like MEETING ROOMS, GROUPS, DOMAINS, PUBLIC WEBSITE, BILLING, EXTERNAL SHARING, MOBILE DEVICES, SERVICE SETTINGS, REPORTS, SERVICE HEALTH, and PURCHASE SERVICES.

Select More > Service Requests

► EXTERNAL SHARING	Outlook, e-mail, calendar, tasks, shared resources	
MOBILE DEVICES		Mobile Device Management No issues
► SERVICE SETTINGS	Online collaboration Skype for Business, video conferencing, screen sharing, IM	Office 365 Portal No issues
REPORTS		Office Subscription No issues
► SERVICE HEALTH		Rights Management Service No issues
► SUPPORT	Sites and document sharing SharePoint, OneDrive for Business, search	SharePoint No issues
Overview		Skype for Business Service degraded ▾
Service Requests	Office client subscription Word, Excel, PowerPoint, OneNote	Social Engagement No issues
PURCHASE SERVICES		Yammer Enterprise No issues
MESSAGE CENTER	Visio Pro Diagrams, flowcharts	
TOOLS	Project Pro Projects, teams, resources	
► ADMIN		
Exchange	Yammer Enterprise Social network, enterprise collaboration	
Skype for Business		
SharePoint		
CRM		
Marketing		
Social Engagement		
Compliance		
More...		View details and history

Select Dynamics CRM Online

► SERVICE SETTINGS	Identity management Active Directory, multi-factor, single sign-on	
REPORTS		
► SERVICE HEALTH		
► SUPPORT	User and domain management Users, groups, domains, sign-on	
Overview		
Service Requests	Delve Discover, search and connect	
PURCHASE SERVICES		
MESSAGE CENTER	Dynamics CRM Online Sales, marketing, customer care	
TOOLS		
► ADMIN		
Exchange	Mobile device management Device security policies, access settings, wipe	
Skype for Business		
SharePoint		
CRM		
Marketing		
Social Engagement		
Compliance		
Azure AD		
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)



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.



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](#)



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](#)

[Back](#)

[Next](#)

[Cancel](#)

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
page 13

Dynamics CRM
User Group
(CRMUG)
page 14

CRM Online
Service Team
Blog
page 14

CRM Support
Team Blog
page 15

Social Media
Sites
page 15



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

Microsoft Dynamics CRM Community

The screenshot shows the Microsoft Dynamics CRM Community homepage. At the top, there's a navigation bar with links for Home, Forum, Blogs, Videos, Calendar, Badges & Experts, Support, and Communities. A 'Join' button and a 'Sign in' link are also present. Below the navigation, a 'FEATURED STORY' section highlights 'Sunshine, Theme Parks, and CRMUG Summit - All Great Reasons to Visit Tampa This October'. There are three main sections below: 'Forum' (14,475 posts), 'Blogs' (15,005 posts), and 'Videos' (351 videos). The 'Blogs' section includes a post from 'CRM' (@ComunidaddCRM) about enabling SSO for Microsoft Dynamics 2013. The 'Videos' section includes a post from 'RT @nzCRMguru' about changing the default dashboard in Dynamics CRM 2013. On the right, there's a sidebar for 'All Activity' showing social, news, and events. A 'My Subscriptions' section at the bottom right encourages users to create personalized subscriptions.

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

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 screenshot shows the CRMUG website homepage. At the top, there's a navigation bar with links for Home, About, Join CRMUG, Events, Member Resources, Training Academy, Conferences, and Online Community. There's also a link to 'Read the CRMUG Magazine'. On the left, there's a banner for 'Collaborate Content Library' with the text 'Premium Members Access Webinars AT ANY TIME! Your Resources. On your schedule.' Below this, there's a section for 'Upcoming Events' listing various meetings and showcases. To the right, there's a clock graphic, a 'Quick Links' sidebar with links to CRMUG Summit 2014, Collaborate, Training Academy, Special Interest Groups, and Regional Chapters, and a 'Socialize With Us!' sidebar with links to Twitter, LinkedIn, Facebook, and the CRMUG Collaborate group. The main content area includes sections for 'Welcome!', 'Recent News', and 'Tweets'.

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.

CRM Online Blogs

CRM Online Service Team Blog:

Go to <https://community.dynamics.com/crm/b/crmonlineservice/default.aspx>

The Service Team Blog will provide you:

- **Updates when unplanned service interruptions occur** (what happened, steps that fixed the issue, plan to prevent from happening in the future...)
- **Insight from Microsoft employees** working on the day-to-day operations and maintenance of the service worldwide

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**
- **Updates** on current support issues
- **Key “tips-n-tricks”** Support uses to resolve common issues

Social Media Sites

