

Help Desk and Troubleshooting Techniques

Help Desk and Troubleshooting Techniques– Agenda

- CRM Troubleshooting Basics
- Questions Needing Answers
- Where to find additional information\Resources
- Microsoft Support contact information

Getting Started

- Screenshot
- Detailed and Exact Repro Steps
- Traces
 - Platform
 - SQL Profiler
 - Netmon/Fiddler
- Customizations
- Log files
 - Setup, Upgrade, Install, Configure
 - Event Logs

Troubleshooting Server

Troubleshooting

- How to enable tracing in Microsoft Dynamics CRM
 - Traces will be located in \Program Files\Microsoft CRM\Trace
 - <http://support.microsoft.com/kb/907490>
- How to modify the Web.config file to show more detailed error messages in Microsoft CRM
 - <http://support.microsoft.com/kb/857192>
- V4.0 CRM Diag Tool
 - <http://code.msdn.microsoft.com/crm/Release/ProjectReleases.aspx?ReleaseId=4011>
 - Turn on\off platform tracing
 - Turn on\off DEV errors
 - Generate Troubleshooting File for Support

Troubleshooting E-mail

Troubleshooting E-mail Router

- Where is the error occurring?
 - Installing the Email router
 - Loading Data
 - Testing Access
 - Incoming Email
 - Outgoing Email
- Confirm Deployment Settings:
 - Incoming and Outgoing Profiles.
 - Verify Incoming profile maps to the Exchange server hosting ExADM directory
 - Verify Outgoing profile maps to server with SMTP installed
 - Deployment tab
- How is the e-mail configured for Forward Mailbox or User-specified?
- Is Exchange Clustered and what version being used?
- Is SSL required for exchange? If so, what is the valid certificate name?
- What update rollup level is currently applied to the router?
- Gather IIS Logs.

Troubleshooting Outlook Client

Troubleshooting CRM Outlook Client - Install

- Is the installing user the 'Local Admin' of the machine?
- Is this a new install or an upgrade?
- Where in the process is the failure?
 - Installing
 - Upgrading
 - Environmental Diagnostic Wizard (EDW)
 - Pre-requisites
- Gather the install logs
- Are the installs being thwarted by a standalone component?
 - SQL Express – If so, attempt to install by itself.
- What version of Outlook and Operating System?
- Multiple clients affected? Where all RIS'd from the same image?
- Are any errors in the Event Viewer?
- Are any anti-virus applications running that could be temporarily disabled?

Troubleshooting CRM Outlook Client - Config

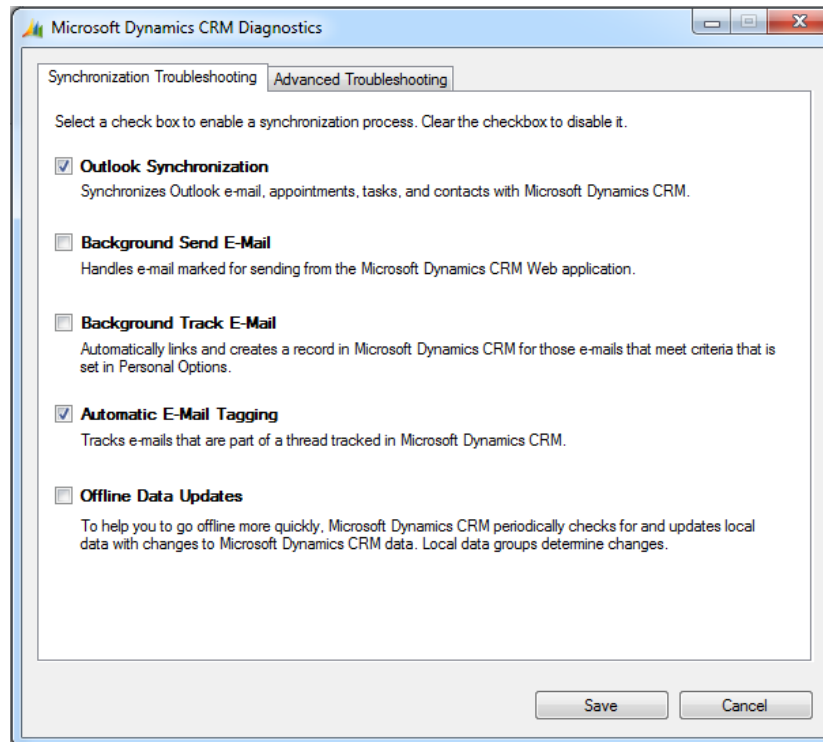
- Is the CRM website set to an 'Assigned IP address' (KB 950416)?
- Have any clients been successfully configured to this deployment?
- Gather the Configuration Logs
- Place the URL in the Local Intranet or Trusted Sites
- Are the latest CRM updates applied to the client machine?
- Is the user connecting via IFD, VPN, or on the LAN?
- Is the user able to open in a browser the URL used for configuration without Windows Authentication challenge?
- What URL is being used in the configuration?

Troubleshooting CRM Outlook Client - Synchronization

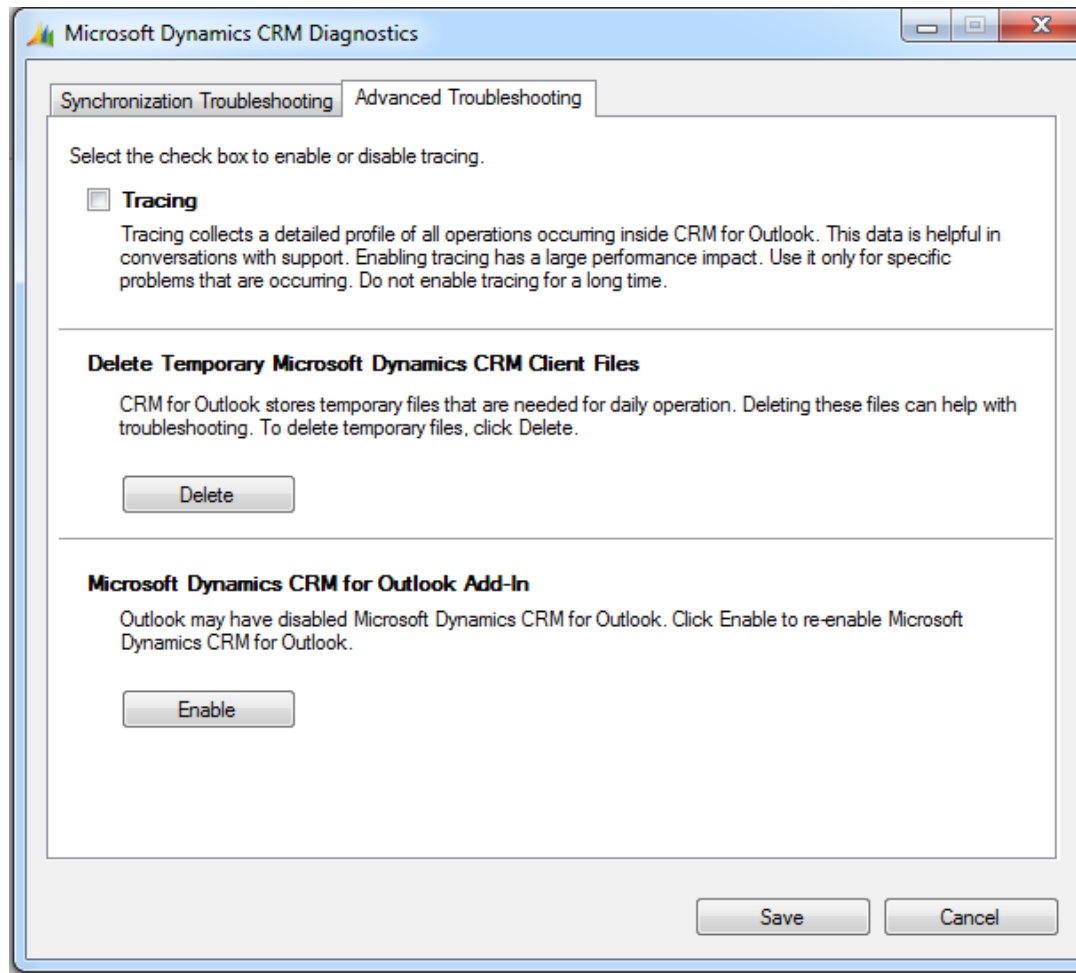
- What type of sync is being performed?
 - Go Offline
 - Have the data filters been customized?
 - Are you able to Go Offline by disabling all the Local Data Filters?
 - Has there been a large data push recently such as a large migration or import of data?
 - Is this an initial or subsequent synchronization attempt?
 - Go Online
 - Manual Sync or Scheduled Sync
- Is the workstation connected via IFD, VPN, or LAN?
 - Is this issue prevalent when using a certain connection type?
- Is the user able to manually Sync?
- Can the user sync after disabling 'Outlook' and 'ABP' sync?
- Are other users able to successfully sync data in the same manner?
- Has this user ever been able to sync successfully in the past?
- What Security Role does the user hold?
- Outlook Add-ins or CRM 3rd Party Integrations?

Microsoft Dynamics CRM Diagnostics

- Available on every CRM Outlook client
 - Start | All Programs | Microsoft Dynamics CRM 2011 | Diagnostics



Microsoft Dynamics CRM Diagnostics



Troubleshooting

- Message when trying to use CRM client offline



Troubleshooting

- Message when installing 2nd client
- Have seen some issues on upgrades
 - Resolution: In Outlook go to CRM > Options and make the client the primary synch client on the Synchronization Tab

Microsoft Dynamics CRM



You already have Microsoft Dynamics CRM client for Outlook installed on another computer. Only one client computer per user can run the automatic process that does bulk updates of Outlook items with Microsoft Dynamics CRM data. This client should be the computer that is most often online (such as a desktop computer) or the user's primary computer. To change the Synchronizing client, on the CRM menu, click Options, and click the Synchronizing tab.

OK

Troubleshooting

- Client Configuration Issues

- Confirm that user is not prompted for login credentials when accessing web client
 - Managed Passwords
- Verify DNS is setup correctly and NSlookup's resolve
 - KB 814591 – Install and Configure DNS on Win2K3 Server
 - KB 200525 – Using Nslookup.exe
 - KB 911353 – Removing Duplicate SPN's
- Check Deployment Properties table in MSCRM_Config
 - KB 970630 – Error during CRM Outlook configuration
 - KB 947423 – Updating port # or host header (NLB)

Troubleshooting

- Client Login Issues
 - Can the user login to the web client successfully?
 - Does the CRM user have a role assigned?
 - Confirm Managed Passwords are not out of date
 - Temporarily disable other 3rd party Addin's
 - If using IFD – Confirm IFD URL is configured correctly

Troubleshooting

- Client Performance
 - Install latest Update Rollup
 - Temporarily disable synchronizations
 - Temporarily disable other 3rd party Addin's and re-enable one by one
 - Gather crash and/or hang dumps
 - KB 286350 – ADPlus Tool
 - Monitor Performance Counters

Troubleshooting Workflow

Troubleshooting Workflow

- Is this a new or existing workflow?
- What is not working?
 - Workflow firing or not advancing to the next step?
 - Workflow state: Stuck, pending, or waiting for resources
- Do any workflows work?
 - Try a new simple workflow
 - Have workflows worked in the past?
- Does the user have permissions to do what the workflow is trying to do?
 - Does the work for the System Administrator
- Can you reproduce on another environment with the same customizations and workflow?
 - Verify testing integrity with security role, ect.
- Review platform trace and event logs
- Does this workflow have any custom workflow activities?
- Are workflow expansion tasks completing?

Troubleshooting Reports

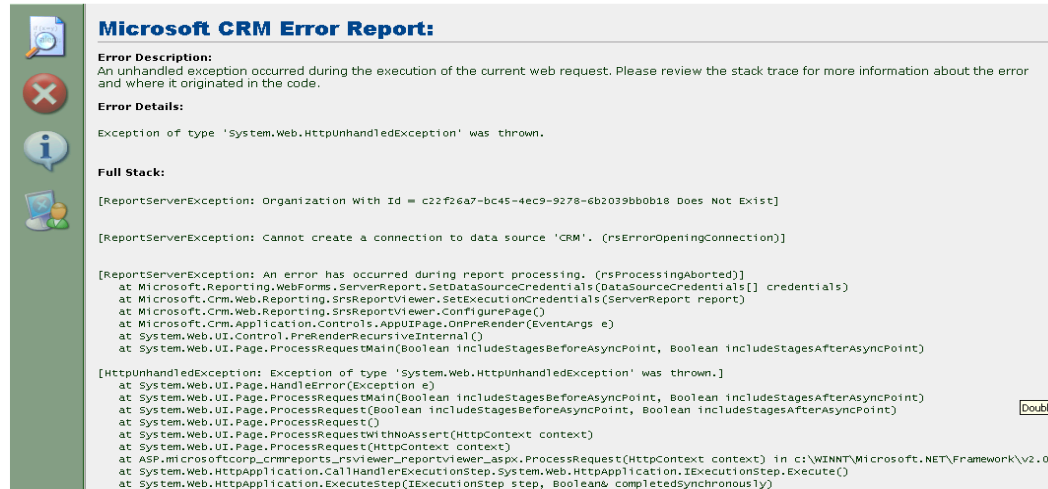
Troubleshooting Reports

- Do reports run in the Reports Manager?
- Where is the error occurring?
 - Rendering the list of reports in CRM?
 - Running the report in CRM?
 - Creating the report using the Report Wizard?
- What is the server layout and versions for SQL/SRS/CRM?
- What account is running the CRMAppPool?
- Gather the SRS Logs from SRS Server from location C:\Program File\SQL Server\MSSQL.3\Logs

Troubleshooting Reports

- Check permission on Reports Manager on the ORG_MSCRM DATASOURCE:
 - Reporting Group should have ROLE Browser for Microsoft CRM
 - SQLAccessGroup should have Browser for Microsoft CRM role
 - If CRMAppPool is running under domain account, then add that domain account to the SQLAccessGroup.
 - If CRMAppPool is running under Network Service, then Network Service should have the Browser for Microsoft CRM role.

Troubleshooting Reports



- Test to see if you can run the report in SRS directly
 - Use the SystemUserId as the username and OrganizationId as the password
- ReportServerException: Cannot create a connection to data source 'CRM'. (rsErrorOpeningConnection)
 - Identity of the application pool used by SRS might not have access to the MSCRM_CONFIG and <Organization_Name_MSCRM> databases
 - Running the report manually in SRS should tell you which account does not have permissions

Troubleshooting Reports

- PrivReportingGroup in AD should have the SRS application pool identity as a member
 - PrivReportingGroup and SRS application pool identity should have the CRMReaderRole role for the <Organization_Name_MSCRM> and MSCRM_Config databases
- Permissions to <OrganizationName_MSCRM> folder in SRS
 - SQLAccessGroup needs the Publisher for Microsoft CRM role

Troubleshooting


- Check if CRM processing extension is not available:

Name:

Description:

☒ Hide in list view

☒ Enable this data source

Connection type:  The data processing extension used for this report is not available. It has either b

Connection string:

Connect using:

☒ Credentials supplied by the user running the report

Display the following text to prompt user for a user name and password:

☐ Use as Windows credentials when connecting to the data source

- Repairing or reinstalling the CRM Data Connector will fix this issue
- Problem could be that it was uninstalled or the registration was removed from the SRS files

Troubleshooting

- Connection string to database stored in the Organization table within the MSCRM_Config database
- SQLRSServerURL registry value no longer used. SRS URL is stored in the Organization table within the MSCRM_Config database
- How to change SRS Servers?
 - Deployment Manager | Disable Org | Edit

Troubleshooting Custom Reports

- Does the report run directly in Reports Manager?
 - Directly uploaded into Reports Manager?
 - Uploaded through CRM?
- How was the custom report created?
 - Reports Wizard
 - Visual Studio
- Where is the error occurring?
 - Uploading into CRM?
 - Running the Report?
 - Printing the Report?

Troubleshooting Customizations

Troubleshooting Customizations

- Where is the error?
 - Importing
 - Exporting
 - Developing
- Importing
 - Can you import the file on another environment?
 - Can you import using a smaller subset of entities?
 - Enable platform tracing and review the log for error
 - Is the user the System Administrator user?
- Exporting
 - Is everything being exported or just one entity?
 - Gather the platform trace while exporting to review for the error
- Customization not working
 - Can you reproduce this on another environment?
 - Does the error occur for all users?

Troubleshooting Performance

Troubleshooting Performance

- Where is the performance issue?
 - Loading a form?, Loading a view?, Saving a form?
- What detailed steps are needed to repro this?
- Are Customizations the issue or a contributing factor?
 - OnLoad/OnSave Events
 - 3rd party integrations
 - SDK Plugins
- Is the Network or Security an issue?
 - Does this repro on the CRM Server using the System Administrator role?
 - What is the location of the CRM Server in relation to the SQL Server?
- What is the latest Update Rollup Level applied to the CRM Server?
- When did these symptoms first begin or has this always been an issue?
- Do all users experience the same performance issue?
- Is this intermittent? If so, what action temporarily alleviates the issue?
 - IIS reset
 - Close the open session and start a new session

Troubleshooting Performance

- Gather Logs and Traces
 - Msinfo32 from SQL/CRM server
 - Platform Trace
 - Info Report
 - SQL Profiler trace; SQL Advanced Options Settings
- What other applications are installed on the CRM and SQL Servers?
- Is a SQL Maintenance plan in effect?
 - How often does it run?
 - What actions?
 - Update Statistics
 - Reindex
- When is the last time database maintenance has been performed?
- How much free space is on the SQL Server drives?
 - What is the drive configuration? RAID 0, RAID 10 etc.
 - Are the mdf and ldf on separate drives?
- What is the Snapshot Isolation level on the MSCRM database?

Submitting Support Requests

- eSupport - <https://mbs.microsoft.com/customersource>
 - eSupport is the recommended method to enter a non-emergency service request
 - eSupport service requests can be submitted through CustomerSource.
 - Enter new service requests
 - Update existing service requests
- Phone Support
 - Dial 888-477-7877
 - Enter your 10-digit authorized number
 - Press 1 if you have an existing incident
 - Press 2 to enter a quick access code for a new incident
 - Press 3 to select the product & module from a list.
 - Select 2 for CRM Support

How to Place a High Severity Call

- CritSit Required

- Call Premier Support using your Premier Account ID at 800-936-3100
- Notify your Technical Account Manager who will coordinate resources and assemble a plan

- Non-CritSit

- During business hours, submit support request via CustomerSource and notify TAM of the critical nature of case
- After hours, call 888-477-3317 and enter your authorized phone number
- There's a \$500 charge for after hours, non-CritSit cases

CRM Links

- CRM Resource Center
 - http://rc.crm.dynamics.com/rc/regcont/en_us/opdefault.aspx
- CRM Team Blog
 - <http://blogs.msdn.com/crm>
- CRM Community Portal
 - <https://community.dynamics.com/crm/home.aspx>
- CRM Forums
 - <http://forums.microsoft.com/dynamics>
- CRM Product Suggestions
 - <https://mbs.microsoft.com/customersource/productsuggestions/productsuggestion.htm>

Summary

- In this module you learned...
 - Troubleshooting Questions and Techniques for:
 - CRM Server
 - E-mail Router
 - CRM Outlook Client
 - Workflow
 - Reports
 - Customizations
 - Performance
 - Microsoft Support Contact Information
 - Additional Information

The Microsoft logo and slogan are centered within a white rectangular area that has a blue gradient header bar at the top and a thin grey border, resembling a presentation window. The logo is in a bold, italicized sans-serif font, and the slogan is in a regular, italicized sans-serif font.

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