

Integration Guide: Microsoft Dynamics CRM Online and Office 365

Last updated: June 2014



This document is provided "as-is". Information and views expressed in this document, including URL and other Internet Web site references, may change without notice.

Some examples depicted herein are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred.

This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes.

© 2014 Microsoft Corporation. All rights reserved.

Microsoft, Active Directory, ActiveX, Azure, BizTalk, JScript, Microsoft Dynamics, Outlook, SharePoint, SQL Server, Visual Basic, Visual Studio, Windows, Windows Server, and Windows Vista are trademarks of the Microsoft group of companies.

All other trademarks are property of their respective owners.

Contents

Integration Guide: Microsoft Dynamics CRM Online and Office 365	5
Who should read this guide.....	5
Assumptions	5
What's in this guide	5
What is Office 365?	6
See Also	6
Add an Office 365 trial subscription to Microsoft Dynamics CRM Online	6
Add users, licenses, and security roles	9
Add users	9
Assign Office 365 and CRM licenses to users	10
Assign Microsoft Dynamics CRM security roles	11
Access CRM from the Office 365 admin center	11
View admin resources	12
See Also	13
Manage user account synchronization	13
Decide on a user management approach	13
Tip for admins: provide a single sign-on organization URL for your users	14
See Also	15
Sign in to CRM Online services	15
For admins: sign in to the Office 365 admin center	15
End users and https://login.microsoftonline.com	16
Direct sign in to CRM Online	18
Direct sign in to Microsoft Social Listening	19
Direct sign in to Microsoft Dynamics Marketing	19
See Also	19
Set up CRM Online to use Exchange Online	19
Deployment Scenarios	20
Scenario 1: Server-side synchronization	20
Scenario 2: Microsoft Dynamics CRM for Outlook	21
Scenario 3: Email Router	25
See Also	26
Set up CRM Online to use Sharepoint Online	26
Assign user permissions to the Team SharePoint site	26
Configure CRM Online for SharePoint document management	28

Configure a new organization	29
Configure an existing organization already using the List Component	33
Using Document Management.....	34
See Also	37
Set up CRM Online to use Lync Online.....	37
Set up Lync in Microsoft Dynamics CRM Online	38
Tracking Lync calls.....	41
See Also	42
Set up CRM Online to use Social Listening	42
Set up CRM Online to use Dynamics Marketing	42
Set up CRM Online to use Yammer	43
Activate Yammer in the Office 365 admin center.....	43
Connect Microsoft Dynamics CRM Online to Yammer.....	43
See Also	47
Check your Office 365 service health.....	47
Additional resources	48
Office 365 Community site	48
Office 365	48
Microsoft Dynamics CRM.....	49
Additional resources.....	49
Send us feedback about this document	49

Integration Guide: Microsoft Dynamics CRM Online and Office 365

Extend the power of Microsoft Dynamics CRM Online with the freedom to work where and when you choose with the online services of Microsoft Office 365. Office 365 delivers the power of cloud productivity to businesses of all sizes, helping to save time and money, and simplifying cross-application integration with Microsoft Dynamics CRM Online.

You can download this document in PDF format from the [Microsoft Download Center](#).

Who should read this guide

This guide is intended for Microsoft Dynamics CRM administrators and technical decision makers interested in exploring Office 365 services and how they integrate with Microsoft Dynamics CRM Online. Integration with Office 365 becomes increasingly relevant to Microsoft Dynamics CRM Online users as management of Microsoft Dynamics CRM Online shifts to the [Microsoft online services environment](#). If you haven't yet transitioned, you can get early experience with the user and subscription management features of Office 365 and get a head start on your transition.

Assumptions

This guide assumes that you have a Microsoft Dynamics CRM Online subscription and that the subscription is managed within the Microsoft online services environment. If you don't have a Microsoft Dynamics CRM Online subscription or your subscription has not yet transitioned, now's the perfect time to [sign up for a CRM trial](#).

The guide assumes that you are using an Office 365 E3 trial or already subscribe to one of the "E" plans for Office 365. See [Add an Office 365 trial subscription to Microsoft Dynamics CRM Online](#) for the process for signing up for an Office 365 trial.

For information on the various Office 365 plans, see [Compare all Office 365 for business plans](#).

What's in this guide

- [What is Office 365?](#)
- [Add an Office 365 trial subscription to Microsoft Dynamics CRM Online](#)
- [Add users, licenses, and security roles](#)
- [Manage user account synchronization](#)
- [Set up CRM Online to use Exchange Online](#)
- [Set up CRM Online to use Sharepoint Online](#)
- [Set up CRM Online to use Lync Online](#)

- [Set up CRM Online to use Yammer](#)
- [Check your Office 365 service health](#)
- [Additional resources](#)

What is Office 365?

The great Office services like Exchange and SharePoint that run on on-premises servers are now available in Office 365 as cloud-based services. With Office 365, you have the choice to delegate the effort and burden of managing those machines to Microsoft.

This guide focuses on the following Office 365 services:

- [Exchange Online](#)
- [SharePoint Online](#)
- [Lync Online](#)
- [Yammer](#)



Tip

Though not covered in this document, take a look at the data compilation and visualization possibilities with [Power BI](#). Also, see the blog post [Dynamics CRM Online in Power Query](#) for a presentation on Power BI and Microsoft Dynamics CRM Online integration.

These videos provide a quick overview of Office 365 services for business:

- [Office 365 feature selection](#) – 2:53
- [Introducing Office 365 Enterprise](#) – 3:05

See Also

[Office 365 Service Descriptions](#)

[Compare all Office 365 for business plans](#)

[Office 365 and CRM](#)

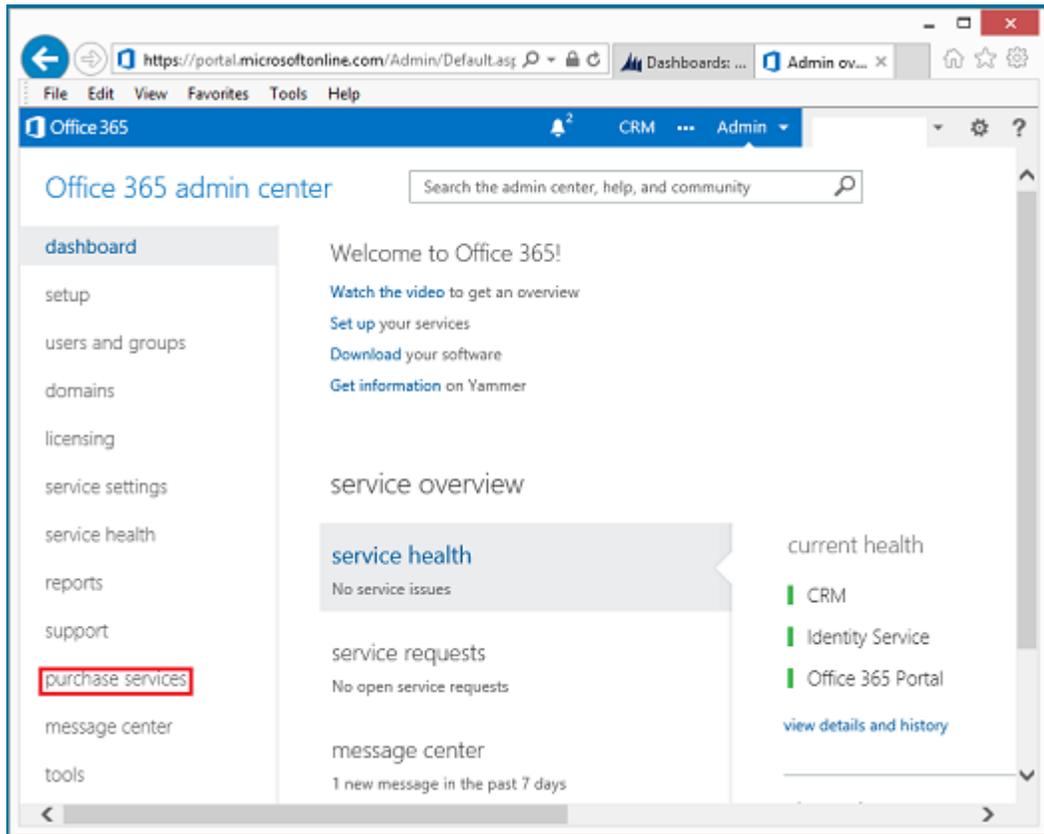
Add an Office 365 trial subscription to Microsoft Dynamics CRM Online

You can add an Office 365 30-day trial to Microsoft Dynamics CRM Online from the Office 365 admin center.

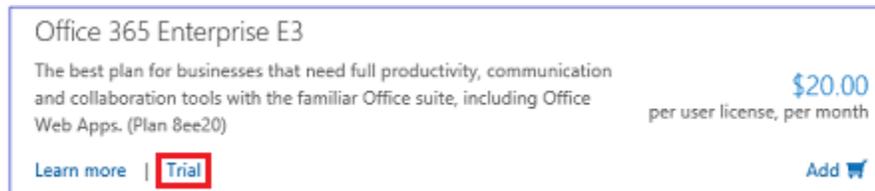
If you want to do a bit of research before jumping in to a trial, see [Office 365 for business](#) and [Additional resources](#).



1. Browse to the Microsoft Office 365 portal (<https://portal.microsoftonline.com>) and sign in using Global administrator credentials.
2. On your Office 365 admin center page, click or tap **purchase services**.

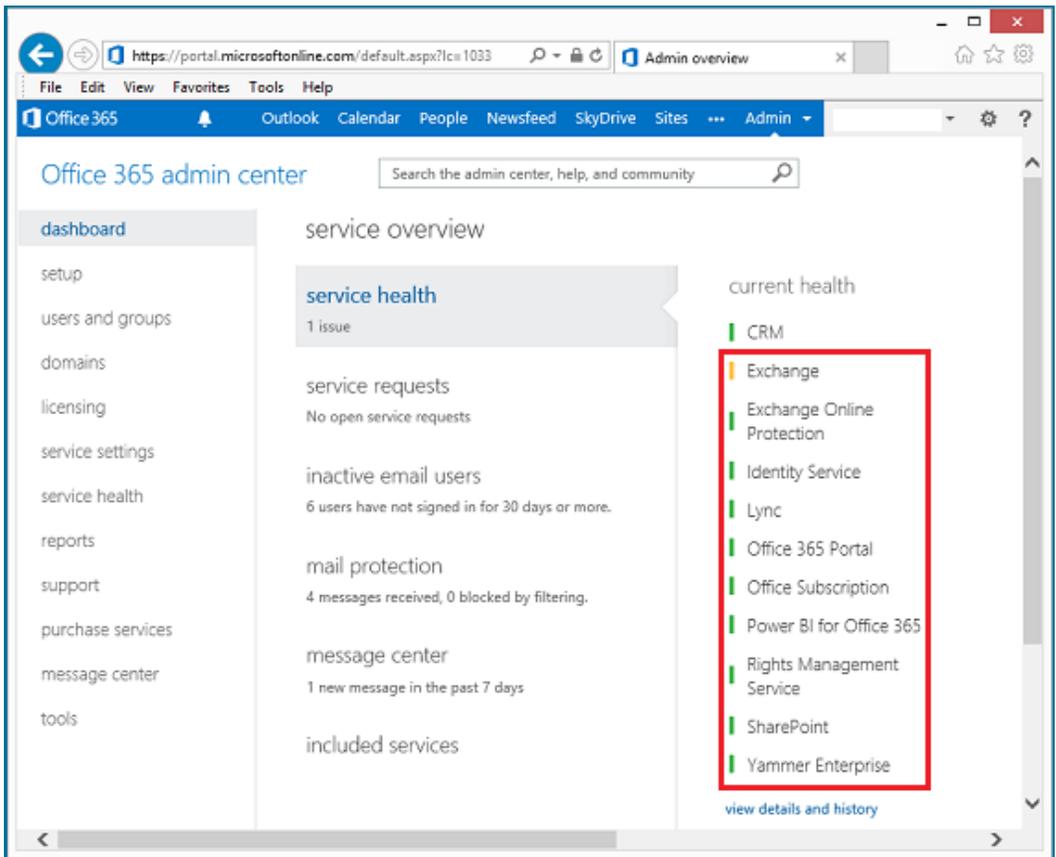


3. On the **purchase services** page, scroll down and click or tap **Trial** for the **Office 365 Enterprise E3** subscription.

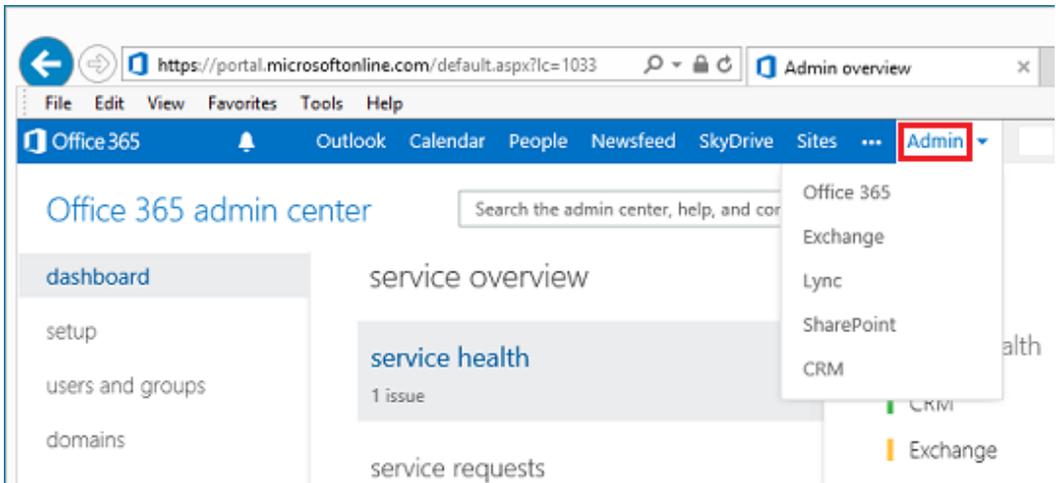


4. Proceed through the pages and complete your trial sign-up.

After your Office 365 trial is active, you'll see new services listed under **current health**.



Click or tap **Admin** at the top of the Office 365 admin center page to view your new Office 365 services.



Add users, licenses, and security roles

If your Microsoft Dynamics CRM Online subscription has transitioned to the Microsoft online services environment, you're already familiar with user and license management in the Office 365 admin center. If you're new to Microsoft Dynamics CRM Online or not yet transitioned, this topic is for you.

Add users

You use the same method to create users for both Office 365 and Microsoft Dynamics CRM Online.



1. Browse to the Office 365 portal (<https://portal.microsoftonline.com>) and sign in using Global administrator credentials.

On the Office 365 admin center page, click or tap **users and groups > Add (+)**.



Tip

You can also bulk add users in the Office 365 admin center. You'll still need to manually assign Microsoft Dynamics CRM security roles.

3. Fill in the user settings and proceed through the remainder of the pages. More information: [Create or edit users](#)

The screenshot shows a web browser window with the URL <https://portal.microsoftonline.com/UserManagement>. The page title is "New user" and the main heading is "details". On the left, there is a navigation menu with five items: "1. details" (highlighted in blue), "2. settings", "3. licenses", "4. send results", and "5. results". The main form area contains the following fields:

- Name**
 - First name:
 - Last name:
 - * Display name:
 - * User name: @ (dropdown menu)
- additional details

At the bottom of the form, there are two buttons: "next" (highlighted in blue) and "cancel".



Note

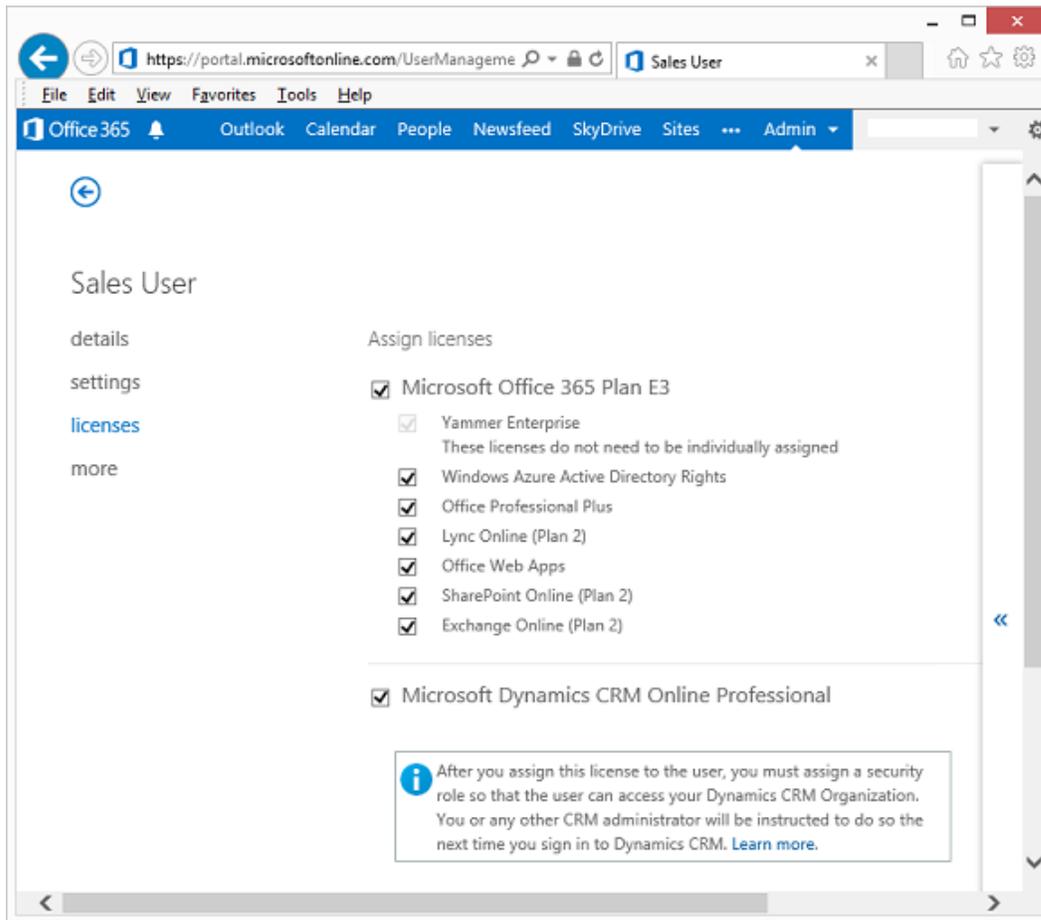
It may take some time for users created in Office 365 to appear in Microsoft Dynamics CRM Online. To force synchronization between Office 365 and Microsoft Dynamics CRM Online, sign out of both programs, close any open Internet browsers, and sign in again.

Assign Office 365 and CRM licenses to users

Each time you create a user account, you need to assign the user a license.



1. On your Office 365 admin center page, choose **users and groups** > **active users** and select a user.
2. Assign licenses and then click or tap **Save**.

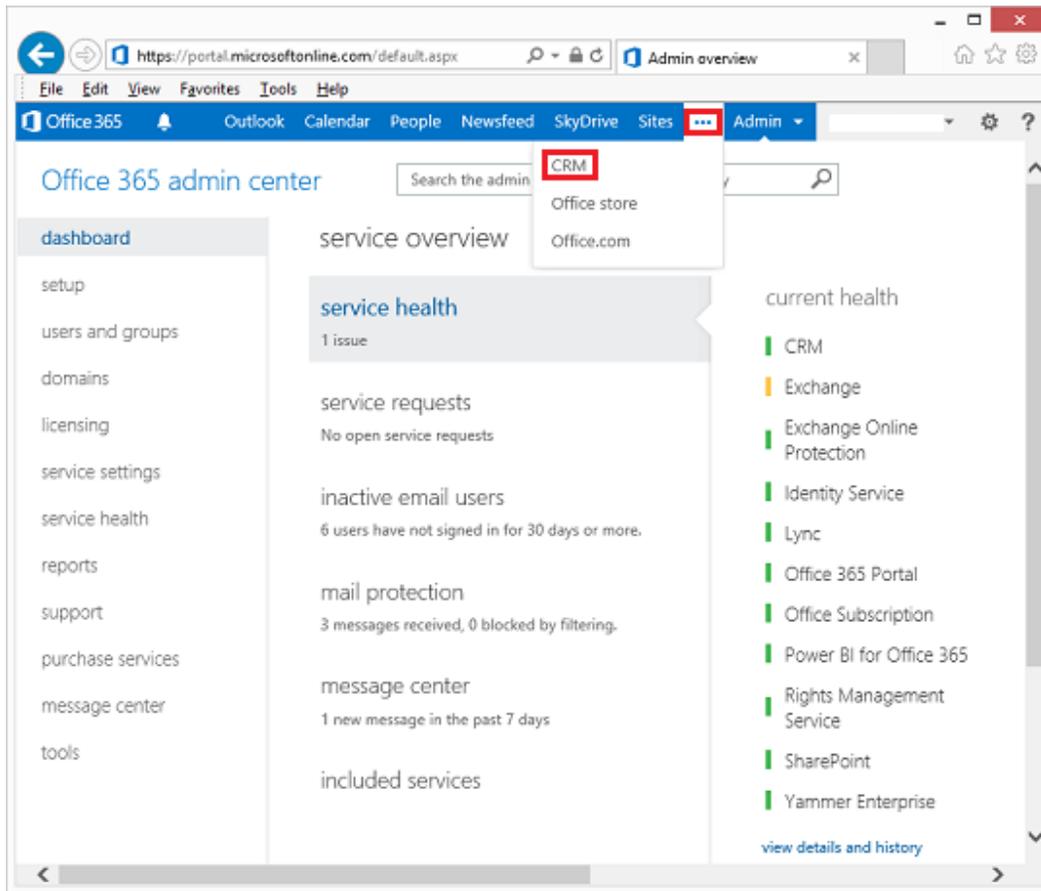


Assign Microsoft Dynamics CRM security roles

For each Microsoft Dynamics CRM Online user, you need to assign the user a security role. See “Assign a security role to a user” in [Create users and assign Microsoft Dynamics CRM Online security roles](#) for the steps.

Access CRM from the Office 365 admin center

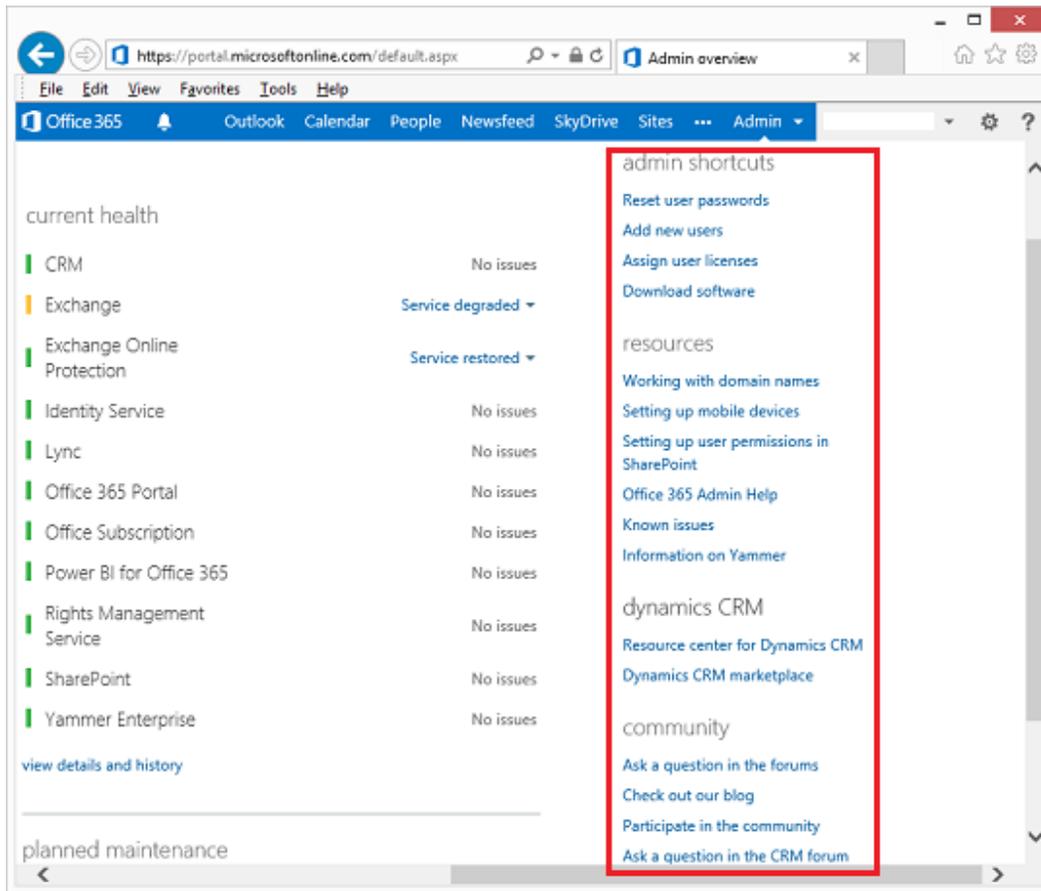
You can navigate to your Microsoft Dynamics CRM Online subscription directly from the Office 365 admin center.



Non-admin users can also use the Office 365 menu bar to connect to Microsoft Dynamics CRM Online.

View admin resources

There are several useful resources linked from the Office 365 admin center page.



See Also

[Create users and assign Microsoft Dynamics CRM Online security roles](#)

Manage user account synchronization

Because Microsoft Dynamics CRM Online user identities are provisioned through Microsoft online services, you have multiple options for managing user synchronization between your online and on-premises environments.

Decide on a user management approach

Watch the video [Office 365 user management and identity options](#) to get a quick overview of your options.

There are three possible methods to manage your user accounts:

1. Manage user accounts in Office 365

This is the simplest approach but can require more long-term administrative effort. Every time you create a new user account, you will need to create the user in two locations: on-premises and in Office 365. Name and password changes will require editing the accounts in both locations.

2. Synchronize on-premises directory objects with Office 365

Active Directory synchronization (also referred to as DirSync) sets up a one-way synchronization relationship between your on-premises Active Directory server and Office 365. You get the benefit of easing the burden of maintaining user accounts without significantly adding to your hardware and failover requirements. However, you will still need to maintain two sets of passwords for your on-premises Active Directory accounts and your Office 365 accounts.

3. Use Active Directory Federation Services (AD FS) to manage users

This approach requires careful planning for redundancy and failover and requires the most expertise and effort to deploy.

In this approach, users in your organization can use corporate credentials to access the services in Office 365 that your company subscribes to such as Microsoft Dynamics CRM Online. Users sign in once and don't have to sign in again to access a different service.

There's a single password to manage.

Your decision on which method to choose is based largely on the size of your company and the depth and breadth of your IT resources.

Review the following resources to equip you to make the right decision for your company:

- [Assess Office 365 readiness using OnRamp](#)
- [Plan for managing Office 365 user accounts using Azure Active Directory](#)
- [Directory integration](#)
- [Whitepaper: Office 365 Adapter - Deploying Office 365 single sign-on using Azure virtual machines](#)

Tip for admins: provide a single sign-on organization URL for your users

If you've deployed synchronization with single sign-on (option 3 above), you can provide a URL to your users that takes advantage of your company's Active Directory and simplifies the sign-in experience.

The URL follows this pattern:

`https://< yourCRMorganizationname>.crm.dynamics.com?whr=<yourFederationServiceIdentifier>`

You can get the `<yourCRMOrganizationName>` by looking at the URL you use to access Microsoft Dynamics CRM Online. For example, in `https://contoso.crm.dynamics.com`, `contoso` is `<yourCRMOrganizationName>`.

Important

The following URLs would be used for subscriptions hosted in these locations.

- EMEA: `https://<yourCRMorganizationname>.crm4.dynamics.com?whr=<yourFederationServiceIdentifier>`
- APAC: `https://<yourCRMorganizationname>.crm5.dynamics.com?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 Microsoft Dynamics CRM Online users and encourage them to bookmark it.

See Also

[Office 365 deployment guide](#)

Sign in to CRM Online services

Multiple Microsoft Dynamics CRM Online services (Microsoft Social Listening, Microsoft Dynamics Marketing, Yammer, etc.) are now available. You can sign in to these services using the Office 365 admin center or sign in directly.

Tip

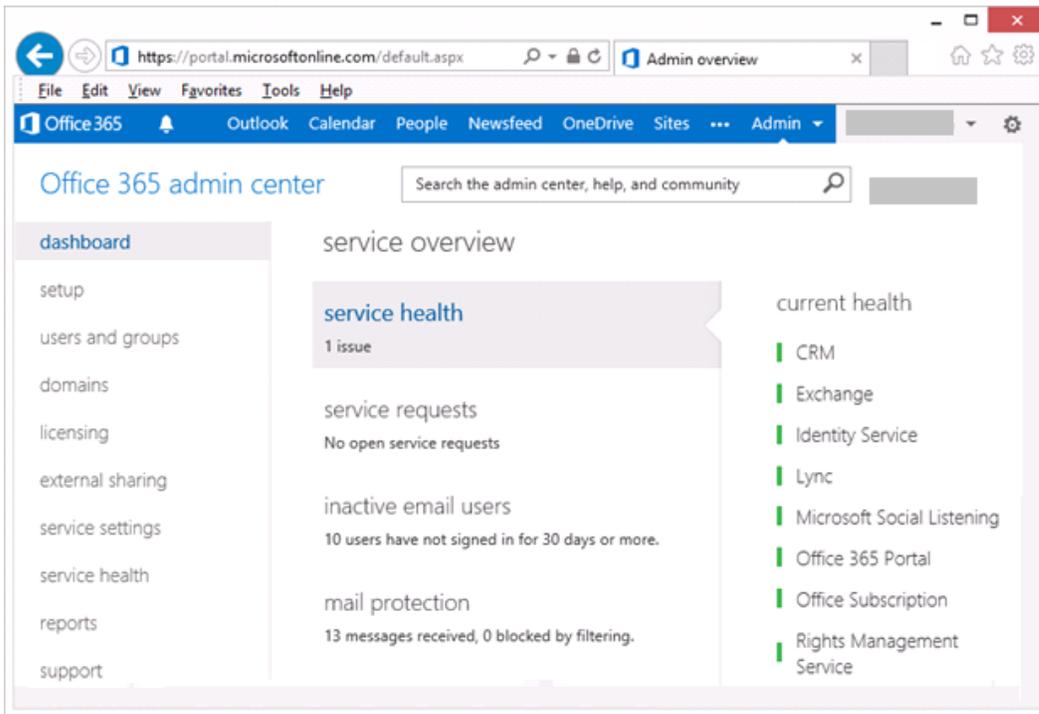
Admins, be sure to share this information with your end users.

For admins: sign in to the Office 365 admin center

A single URL gives admins access to all the CRM Online services associated with their Microsoft online services environment:

<https://portal.microsoftonline.com>

In the Office 365 admin center, you can see your service health, manage users, manage licenses, and more for all the online services associated with your account.



For more information on the Office 365 admin center, see “Exploring the Office 365 Administration Center” on the [Office 365 Guides](#) site.

End users and <https://login.microsoftonline.com>

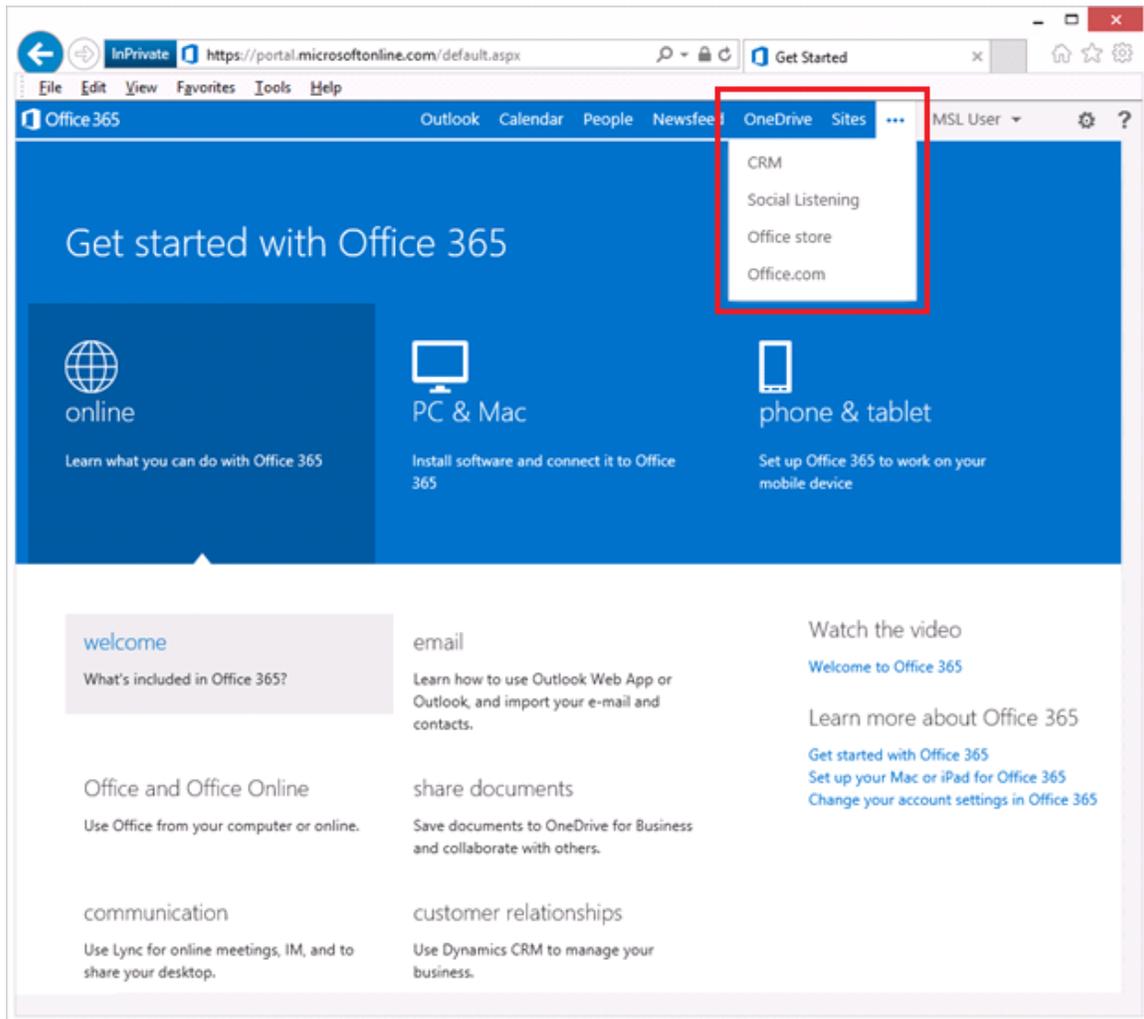
When end users sign in to <https://login.microsoftonline.com> (or <https://portal.microsoftonline.com>), what they see varies based on the user account licenses:

Services			Licenses			
CRM Online	X	X	X	X		
Office 365 Enterprise Plan	X	X			X	
Microsoft Social Listening or Dynamics Marketing	X		X		X	X

Services			Licenses			
Page that opens:	Get started/Outlook Web Access (OWA)	Get started/Outlook Web Access (OWA)	CRM Online	CRM Online	Get started/Outlook Web Access (OWA)	Microsoft Social Listening or Dynamics Marketing

- Users with only a CRM Online license will sign in to CRM Online.
- Users with an Office 365 license and any other service license will see the “Get started with Office 365” page for 30 days and the Outlook Web App after 30 days.
- Users licensed for Microsoft Social Listening or Microsoft Dynamics Marketing will sign in to CRM Online if they have a CRM Online license and no Office 365 license.

Users licensed for Microsoft Social Listening or Microsoft Dynamics Marketing can click or tap the ellipses (...) from the Office 365 menu bar to select a service.



Direct sign in to CRM Online

To directly sign in to the CRM Online service, use:

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



Note

For other regions, replace .crm with:

- .crm4 for Europe (EMEA)
- .crm5 for Asia (APAC)

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or has a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Social Listening

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

`https://listening.microsoft.com/app/<appID>`

This URL which includes the appID is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, `username@contoso.onmicrosoft.com`) or has a custom domain (for example, `username@contoso.com`).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Dynamics Marketing

To directly sign in to the Microsoft Dynamics Marketing service, use:

`https://<tenant>.marketing.dynamics.com`

This URL is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, `username@contoso.onmicrosoft.com`) or has a custom domain (for example, `username@contoso.com`).

CRM administrators can provide the URL and sign-in information.

See Also

[Integration Guide: Microsoft Dynamics CRM Online and Office 365](#)

[Troubleshoot sign-in problems](#)

[Sign in to Microsoft Dynamics Marketing](#)

[Social Listening Help Center](#)

Set up CRM Online to use Exchange Online

You know how important email is to your business and what happens when email stops flowing for even a short time. You can rid yourself of much of the stress of managing an email server by letting Microsoft Office 365 host your email service with Exchange Online. Then integrate Exchange Online with Microsoft Dynamics CRM Online to take advantage of CRM Online email features.

Start by picking a deployment scenario.

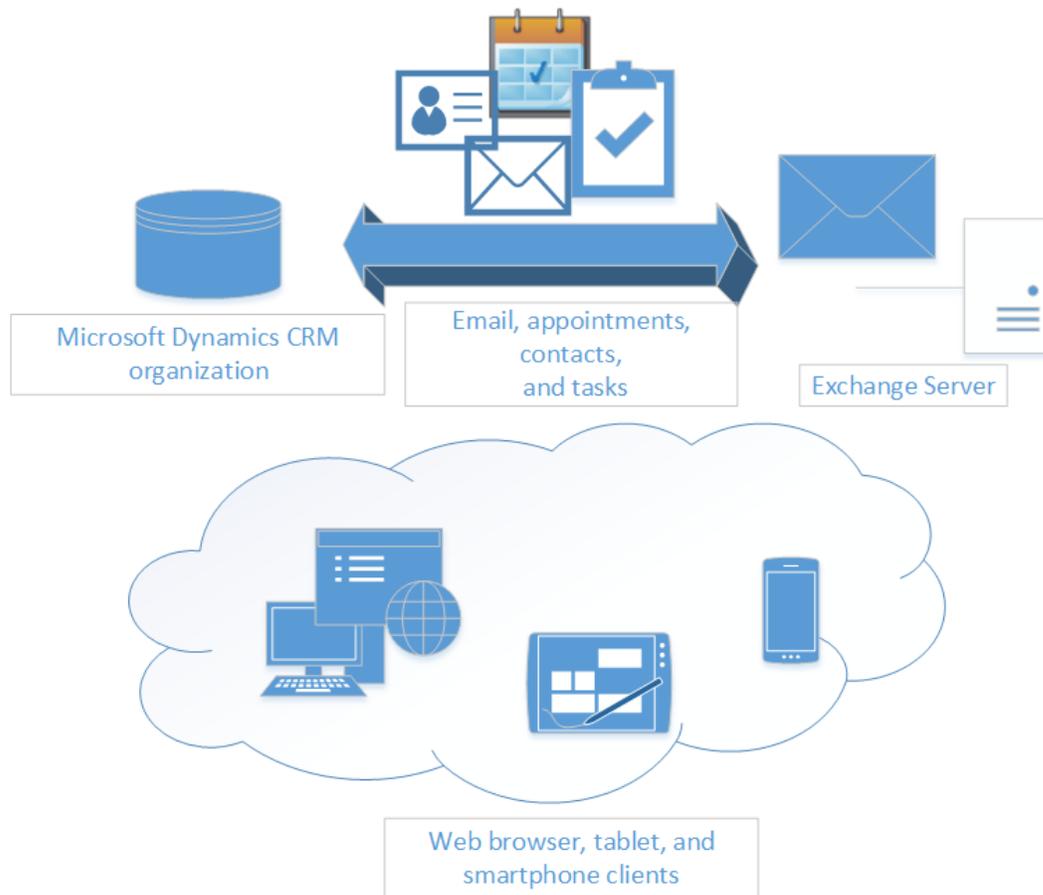
Deployment Scenarios

You have choices when it comes to synchronizing messaging between Exchange Online and CRM Online. Review the following scenarios to determine the best choice for your company.

More information: [Planning messaging integration in Microsoft Dynamics CRM 2013](#)

Scenario 1: Server-side synchronization

With Microsoft Dynamics CRM Online Spring '14, you can now set synchronization of email messages, tasks, contacts, and appointments between CRM Online and Exchange Online. To use this functionality you don't have to install and maintain a separate application. Setup is simpler and maintenance is easier compared to other deployment scenarios. Server-side synchronization is the preferred option for organizations with users who run Microsoft Dynamics CRM in a web browser or on mobile devices, such as tablets or smartphones.



You configure and manage server-side synchronization from within CRM Online. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings > Email Configuration**, and then click or tap

Email Configuration Settings. More information: **Server-side synchronization of email, appointments, contacts, and tasks**

Scenario 2: Microsoft Dynamics CRM for Outlook

Microsoft Dynamics CRM for Outlook provides messaging data integration capabilities on a single-user basis. CRM for Outlook is a Microsoft Outlook add-in that doesn't require server-side synchronization or the Email Router as the synchronization agent runs in the Microsoft Outlook client on the user's PC. This is frequently the better option for organizations that regularly use Microsoft Outlook, especially if they need rich offline data capabilities. Note that if CRM for Outlook isn't running, messaging synchronization doesn't occur until Microsoft Outlook is started again.

In this scenario, all of the Microsoft Dynamics CRM Online users in your company will use Microsoft Dynamics CRM for Outlook as the email client. Microsoft Dynamics CRM for Outlook must be installed for every user in the organization. More information: [Install CRM for Outlook for Microsoft Dynamics CRM 2013 and Dynamics CRM Online](#)

Note

This scenario assumes you have set up Microsoft Outlook to connect to Exchange Online. See [Set up your Office 365 or other Exchange-based email in Outlook 2010 or Outlook 2013](#).

Installing Microsoft Dynamics CRM for Outlook

1. Sign in to your Microsoft Dynamics CRM Online organization, for example: <https://contoso.crm.dynamics.com>

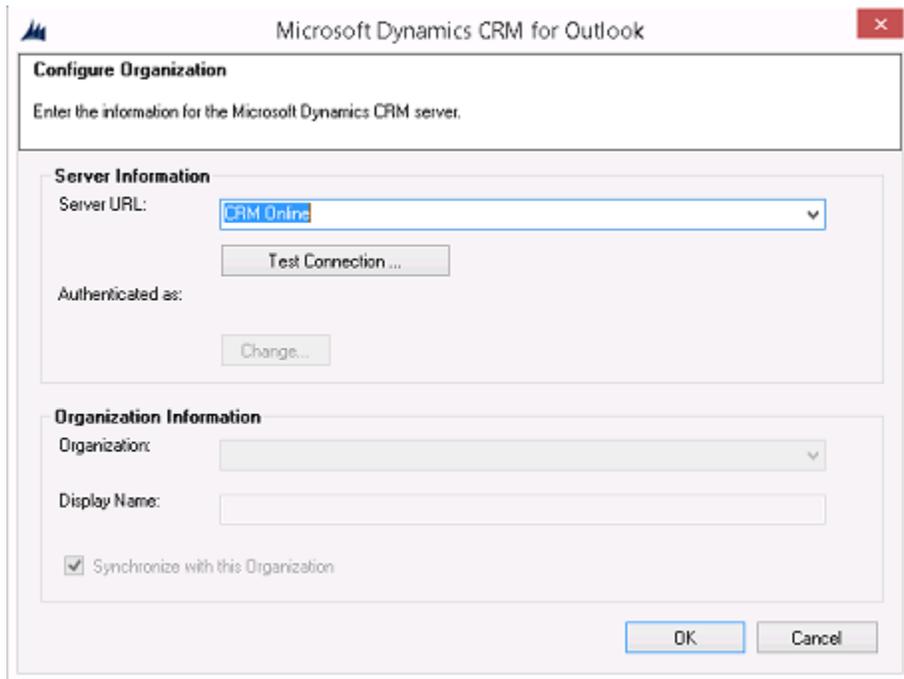
Note

These steps assume the user logging on is a regular user and not a Global administrator.

2. Click or tap **Get CRM for Outlook**.

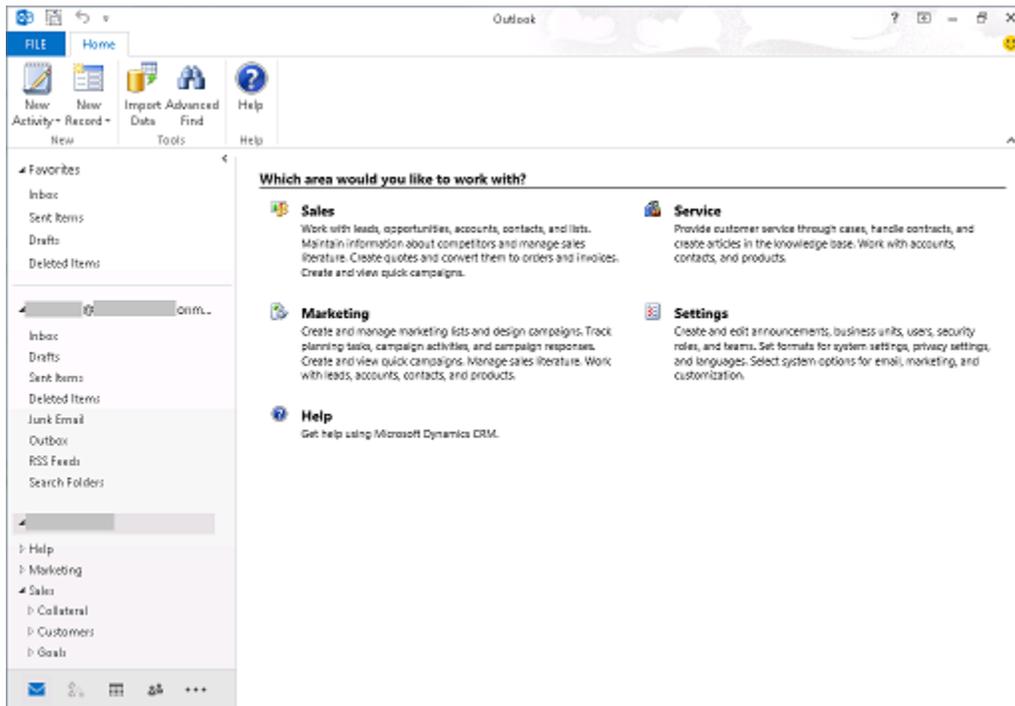


- If this button is not visible, you can install the Outlook client from the [Download Center](#).
3. Click or tap **Run**, click or tap **Yes**, select a folder, and then click or tap **OK**.
 4. Continue through Microsoft Dynamics CRM 2013 for Outlook Setup to complete the installation. For more information, see [Install CRM for Outlook](#).
 5. Open Outlook. The Microsoft Dynamics CRM for Outlook Configuration Wizard should appear. Select **CRM Online** for the **Server URL**, and then click or tap **Test Connection**.

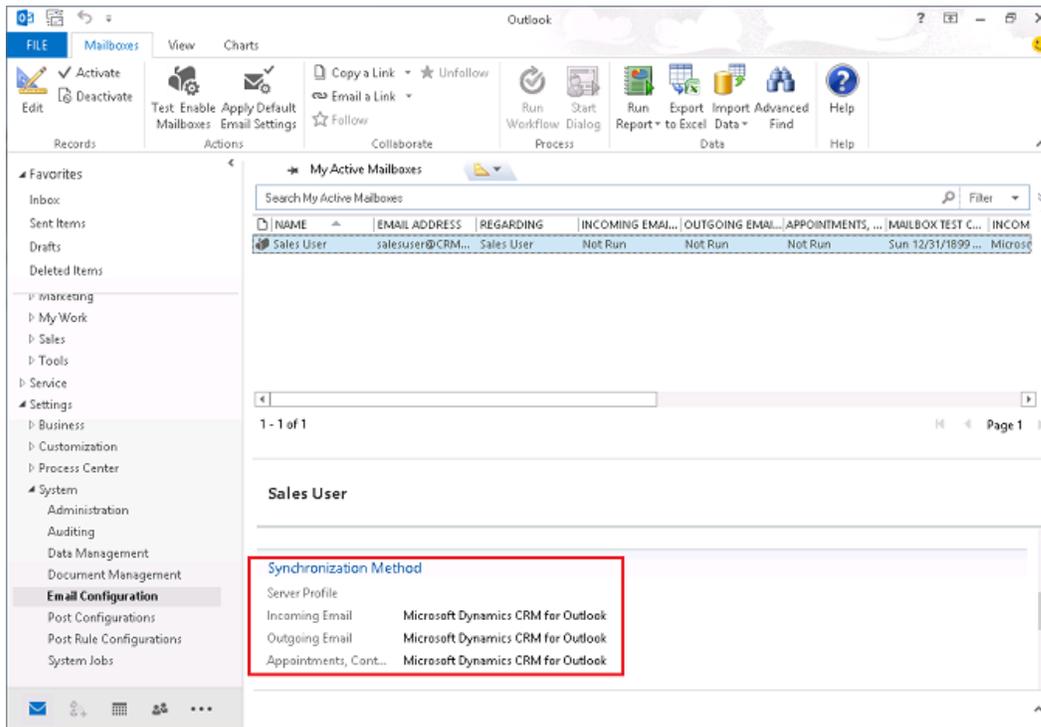


6. When you are prompted, enter your Microsoft online services user name and password (for example: someone@contoso.onmicrosoft.com), and then click or tap **OK**.
7. After authentication, the **Organization Information** is updated with your Microsoft Dynamics CRM organization. Click or tap **OK** to complete the configuration.

Microsoft Dynamics CRM Online is now integrated into your Microsoft Outlook. For information about how to use Microsoft Dynamics CRM Online for Outlook, see [Do your CRM work in Outlook](#).



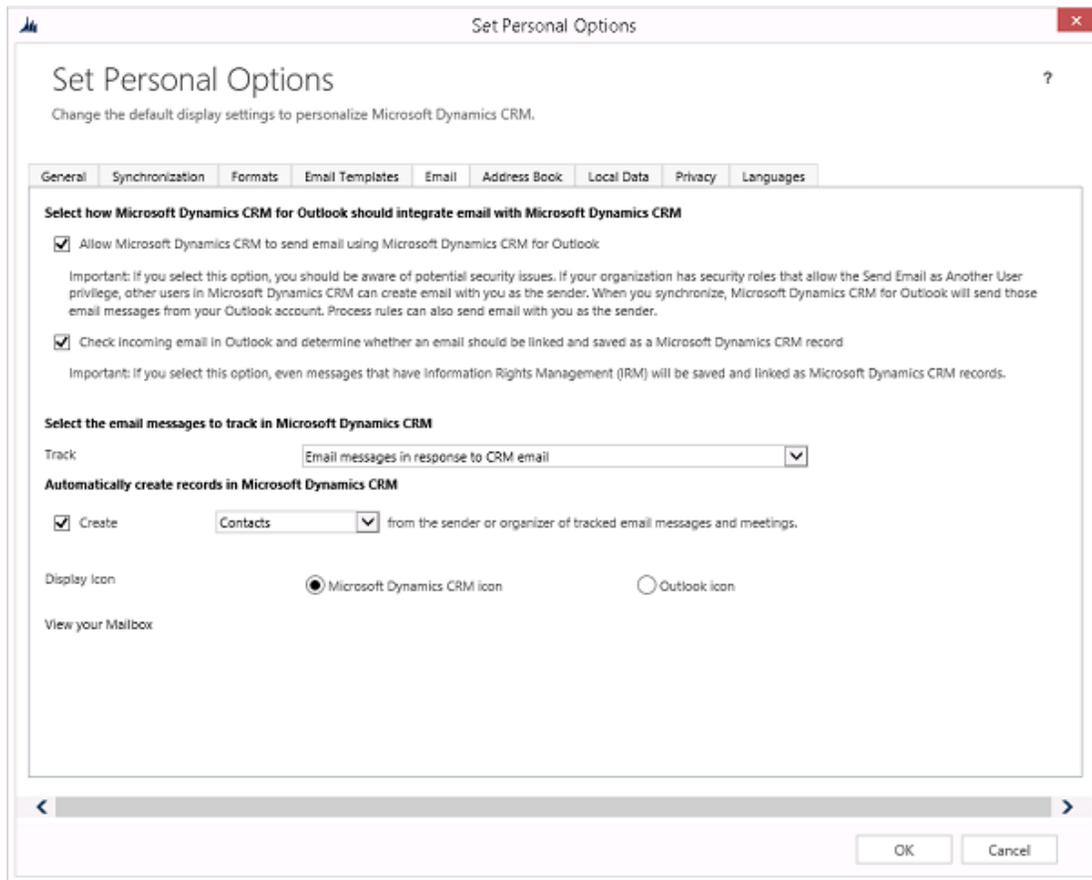
To use Microsoft Outlook as the email client in a new installation of Microsoft Dynamics CRM Online, no additional configuration in Microsoft Dynamics CRM Online is required. This is because new users of Microsoft Dynamics CRM Online are automatically configured to use Microsoft Dynamics CRM Online for Outlook as the incoming and outgoing email client. You can find this configuration setting in the **Synchronization Method** area of the user mailbox settings (**Settings > System > Email Configuration > Mailboxes > your mailbox**).



You can further set personal options for Microsoft Dynamics CRM Online for Outlook. For example, you can track and save email as activity records.

► **Automatically tracking and saving Outlook email as Microsoft Dynamics CRM Online email activities**

1. In Outlook, click or tap **File > CRM tab > Options**.
2. In the **Set Personal Options** dialog box, click or tap the **Email** tab.



3. To send email messages from Microsoft Dynamics CRM Online for Outlook, in the **Select how Microsoft Dynamics CRM for Outlook should integrate email with Microsoft Dynamics CRM** section, select the **Allow Microsoft Dynamics CRM to send email using Microsoft Dynamics CRM for Outlook** check box.
4. To automatically link and save incoming email messages as Microsoft Dynamics CRM Online records, select the **Check incoming email in Outlook and determine whether an email should be linked and saved as a Microsoft Dynamics CRM record** check box.
5. Click or tap **OK**.

For more information about setting options, see [Automatically track and save incoming Outlook email as Microsoft Dynamics CRM email activities](#).

Scenario 3: Email Router

The **Microsoft Dynamics CRM Email Router** is a separate application that provides centrally managed Exchange Server and POP3/SMTP-based email server email routing for users, queues, and forward mailboxes. The Email Router runs continuously as a service and only synchronizes email messages. It cannot be used to synchronize appointments, contacts, or tasks.

Hybrid scenarios (CRM Online with Exchange on-premises, or CRM on-premises with Exchange Online) are only supported with Email Router and CRM for Outlook synchronization. In addition, we recommend that you run the Email Router if you use Exchange Server 2007, or if you have users that use both Exchange Server and POP3 email systems. More information: **Microsoft Dynamics CRM Email Router**

See Also

[Exchange Online for IT Pros](#)

Set up CRM Online to use Sharepoint Online

When you use Microsoft SharePoint Online with Microsoft Dynamics CRM Online, you can:

- Create, upload, view, and delete documents stored in SharePoint from within Microsoft Dynamics CRM.
- Use the SharePoint document management abilities within Microsoft Dynamics CRM, such as checking the document in and out, viewing version history, and changing document properties.
- Enable non-Microsoft Dynamics CRM users, such as customers who want to review a bid, to directly access the SharePoint documents, provided they have the appropriate permissions.

Important

This topic is for organizations who wish to deploy for the first time or upgrade to 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: **SharePoint Document Management software requirements for Microsoft Dynamics CRM 2013**

To set up CRM Online to use SharePoint Online, complete the following steps.

Tip

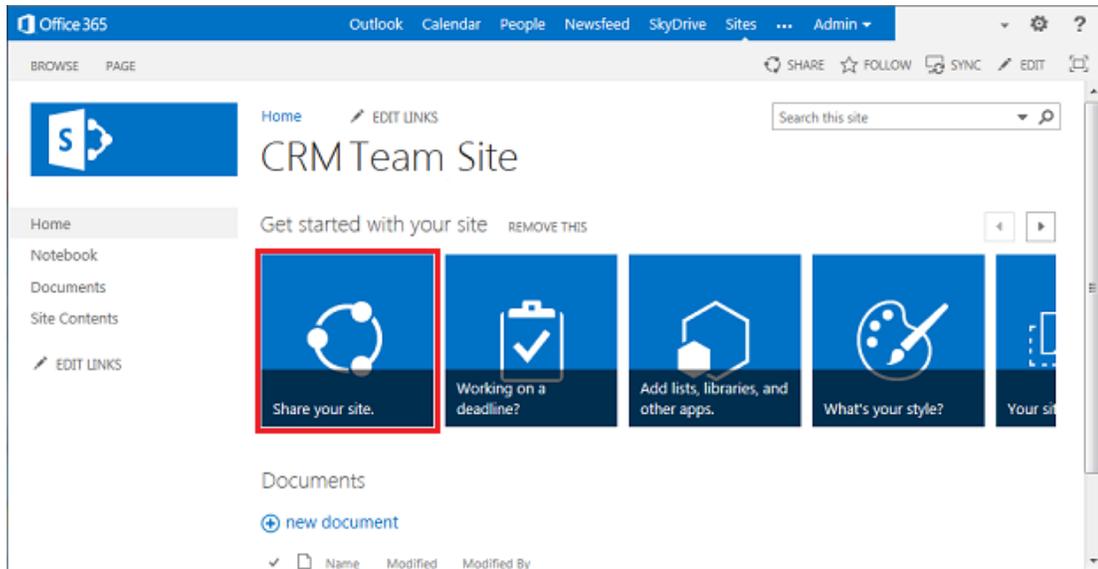
Check out the following video on Microsoft Dynamics CRM Online Spring '14 SharePoint document management: <http://youtu.be/guBcprvtiSo>.

Assign user permissions to the Team SharePoint site

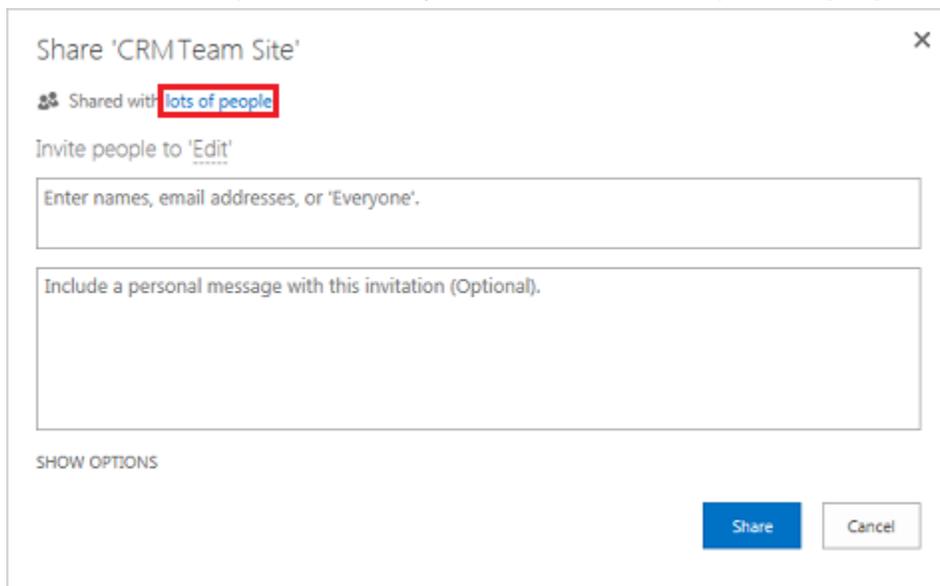
Your Microsoft Dynamics CRM Online and Microsoft Office 365 users are not automatically allowed access to your SharePoint sites. You must work within the SharePoint site to assign specific permission levels to individual users or groups.

► **Assign users to the Team site**

1. Browse to the Microsoft Office 365 portal (<https://portal.microsoftonline.com>) and sign in using Global administrator credentials.
2. Click or tap **Sites > Team Site**.
3. On the Home page, click or tap **Share your site**.

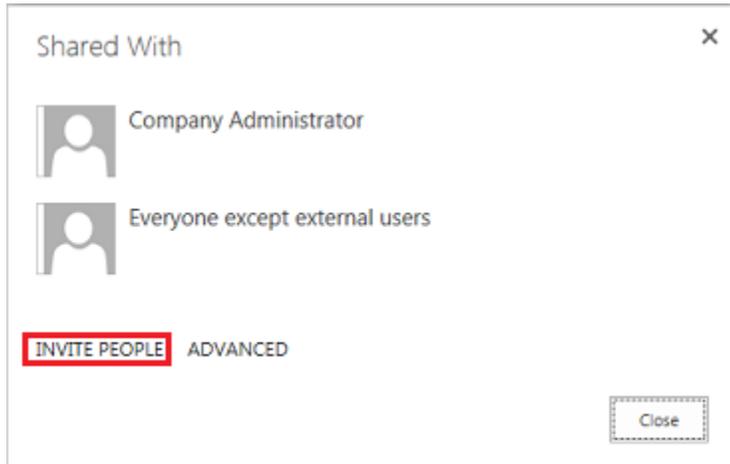


4. To view the default permissions for your team site, click or tap **lots of people**.



5. By default, all users in your Microsoft Office 365 organization are able to add and edit documents on the Team SharePoint site. To invite others, click or tap **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 CRM Online for SharePoint document management

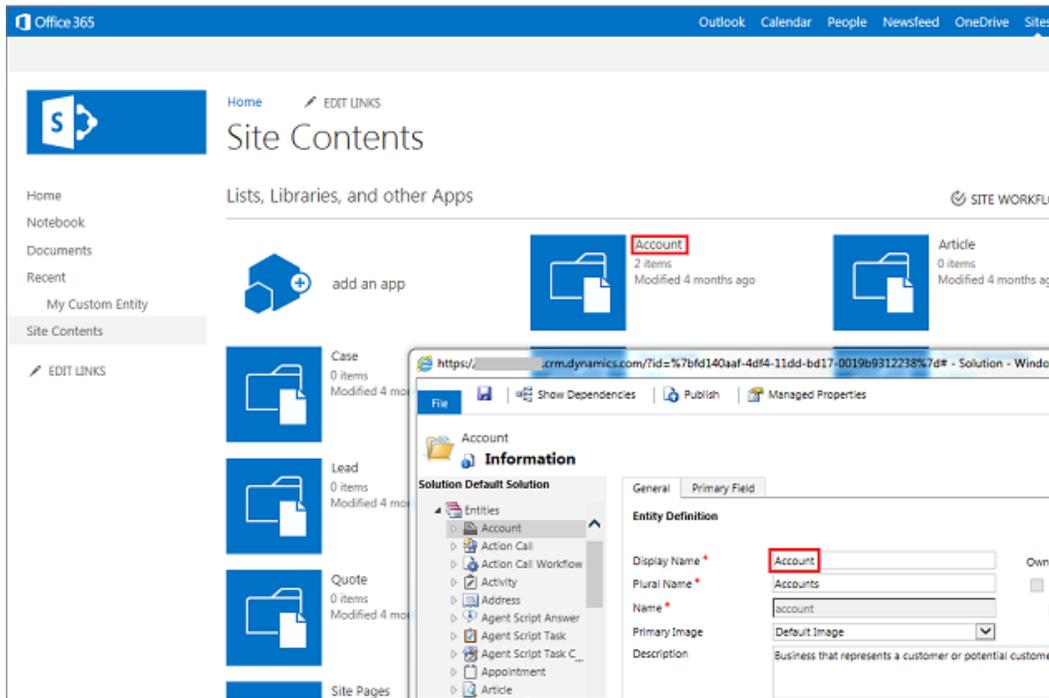
For CRM Online organizations, Microsoft Dynamics CRM Online Spring '14 introduces a new server-based (using server-to-server authentication) SharePoint integration that removes the need to install or continue to use the Microsoft Dynamics CRM List Component solution.

If you are a new organization and have not yet deployed document management, see [Configure a new organization](#).

If you're using the Microsoft Dynamics CRM List Component to integrate SharePoint document management with CRM Online, you can upgrade to server-based SharePoint and use CRM Online with SharePoint Online. See [Configure an existing organization already using the List Component](#)

Important

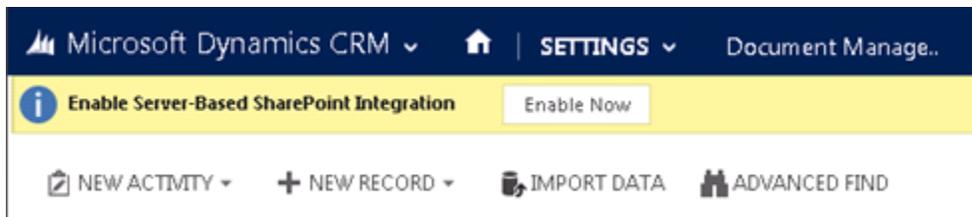
The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in CRM. Server-based SharePoint integration uses the entity display name. When you upgrade to server-based SharePoint integration, be sure to check that the display names in your document library on SharePoint match the entity display names in CRM. More information: <http://go.microsoft.com/fwlink/?LinkID=402112>.



These names should match.

Configure a new organization

If your CRM organization has not deployed document management, when a CRM System Administrator logs in an alert message will be displayed to enable server-based SharePoint integration.



Note

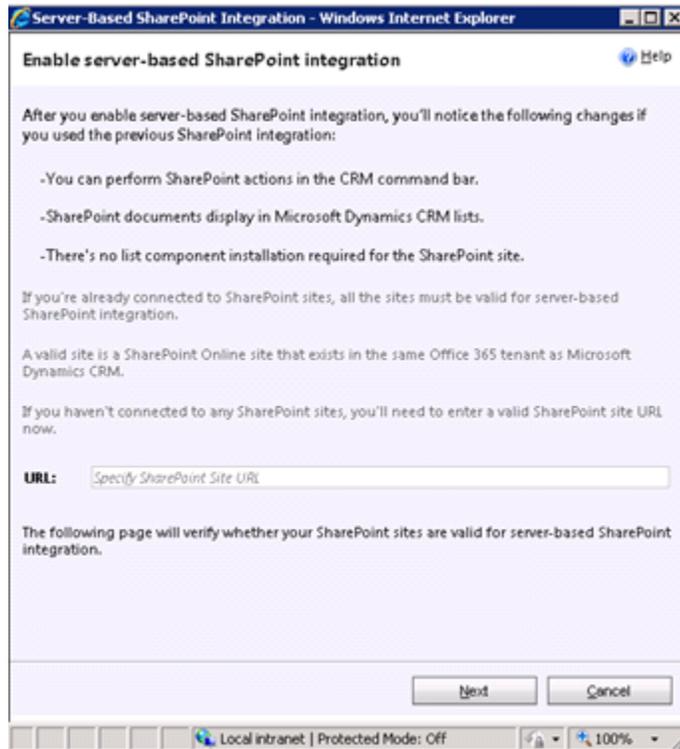
If you don't see the alert and have not previously enabled server-based SharePoint integration, clear your browser cache or open CRM using Internet Explorer with InPrivate browsing to have the alert display again. Once you configure server-based integration, the alert will no longer appear.



1. In the Enable Server-based SharePoint Integration alert click **Enable Now** to launch the

Configuration Wizard.

2. If your Microsoft Dynamics CRM Online is not connected to a SharePoint online site, enter the URL of your SharePoint site that you will use for auto folder creation, and then click or tap **Next**.



3. The URL will be checked for being a valid SharePoint online site and for existing in the same Office 365 tenant as your CRM organization. After enabling server-based SharePoint integration you can't go back to the previous client-side integration. Click or tap **Next** and then **Finish**.

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.

4. Go to **Settings > Document Management > Document Management Settings**.
5. Select the entities to be integrated with document management.

Enter the Microsoft Office 365 SharePoint Online URL (for example: <https://contoso.sharepoint.com>), and then click or tap **Next**.

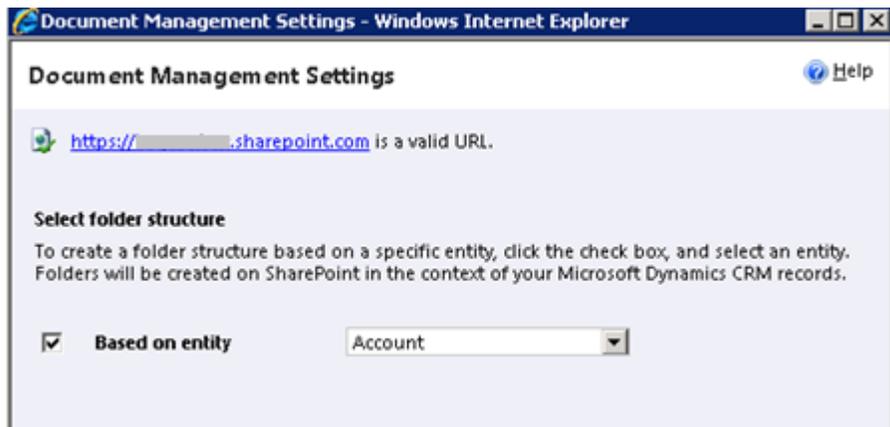


 **Tip**

To get your SharePoint Online URL, go to your Team site and review the URL in the address bar.

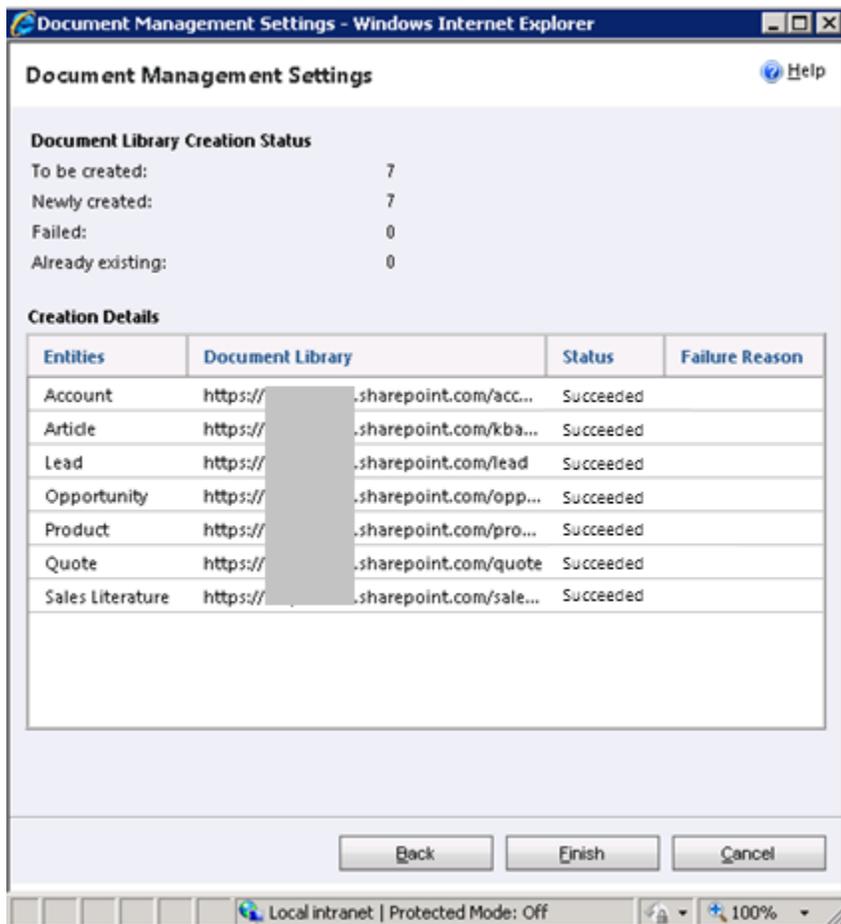
6. This will validate the URL you entered as well as give you the option to base the folder structure on Account or Contact.

For more information on folder structure click or tap the **Help** button, or see [Enable document management on entities](#).



Click or tap **Next**.

7. Click or tap **OK** to create Document Libraries.
8. Your folders will be set up in SharePoint. When the list is complete, click or tap **Finish**.



Configure an existing organization already using the List Component

If your organization is already using document management with Microsoft Dynamics CRM List Component, you can enable server-based SharePoint integration.



1. Go to **Settings > Document Management > Document Management Settings**.
2. Click or tap **Enable server-based SharePoint integration**.

Document Management

Which feature would you like to work with?



Document Management Settings
Select default document management settings for your organization.



Install List Component
Install List Component



SharePoint Sites
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.

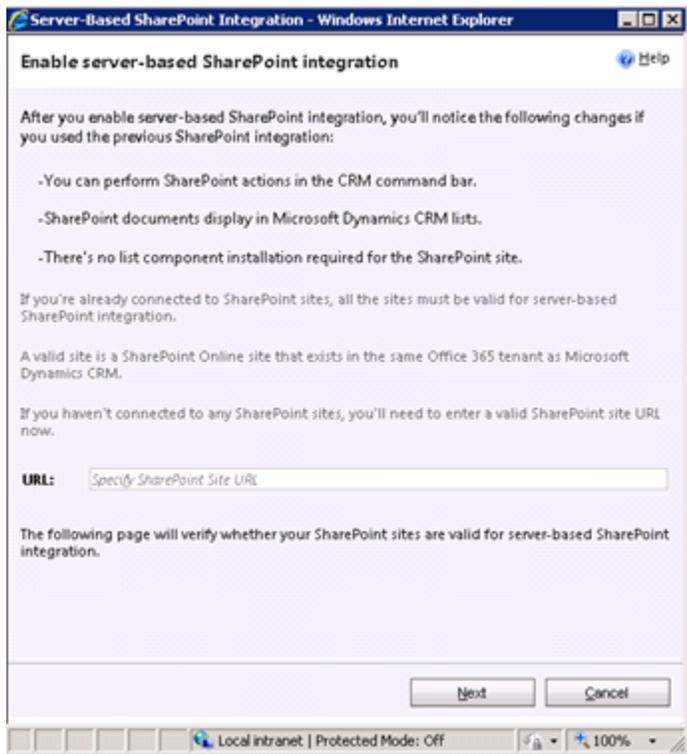


SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.



Enable server-based SharePoint integration
We recommend that you enable server-based SharePoint integration. Your current SharePoint integration relies on installing a list component on a sandbox solution in SharePoint. SharePoint will no longer be supporting the sandbox solution feature.

3. If the SharePoint site you connected to with the List Component is valid for server-based SharePoint integration, then you can proceed. Otherwise, you'll need to remove the site (**Microsoft Dynamics CRM > Settings > Document Management > SharePoint Sites**) and then come back to this wizard and enter the URL of a new SharePoint online site here.



Click or tap **Next** to validate existing URLs.

If any of the URLs do not meet the validation requirements, server-based SharePoint integration will fail. Server-based integration cannot be enabled if the URL is not a valid SharePoint online URL or if the SharePoint site you want to connect to is not in the same Office 365 tenant as your CRM organization. Those URLs must be removed before enabling server-based integration, or the List Component would still need to be used.

4. Click or tap **Next** and then **Finish** to complete the wizard.

After you enable server-based SharePoint integration the options to install List Components and to enable server-based integration will no longer appear as options in Document Management.

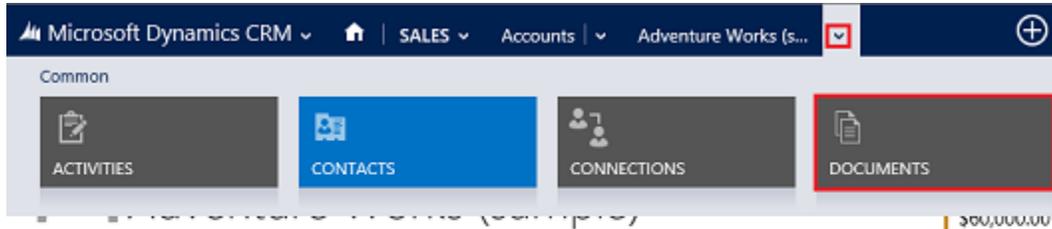
Using Document Management

You are now ready to add document storage locations to the entities you enabled above and start managing documents. Begin by opening a document management-enabled record (for example, Contact).

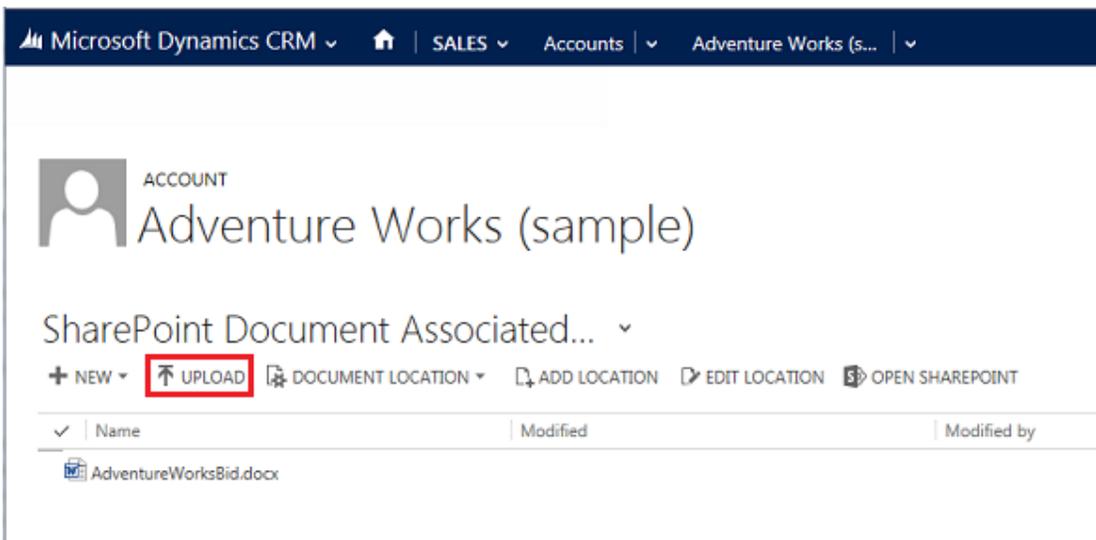


1. Browse to your Microsoft Dynamics CRM Online web application.
2. Go to **Microsoft Dynamics CRM > Sales > Accounts**

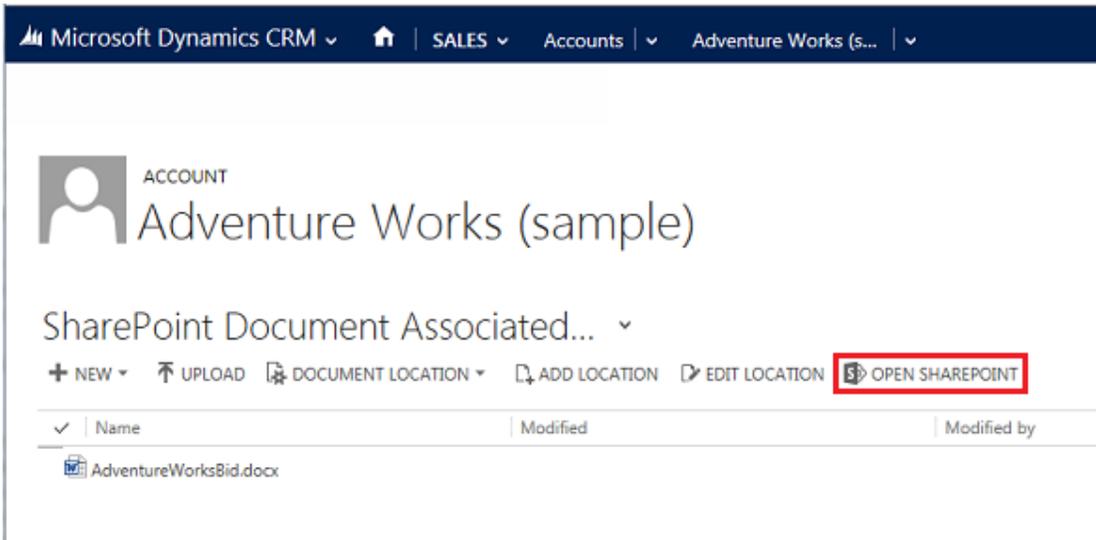
3. Click or tap an account, such as the **Adventure Works** sample account.
4. On the nav bar, click or tap the down arrow next to the account name, and then click or tap **Documents**.



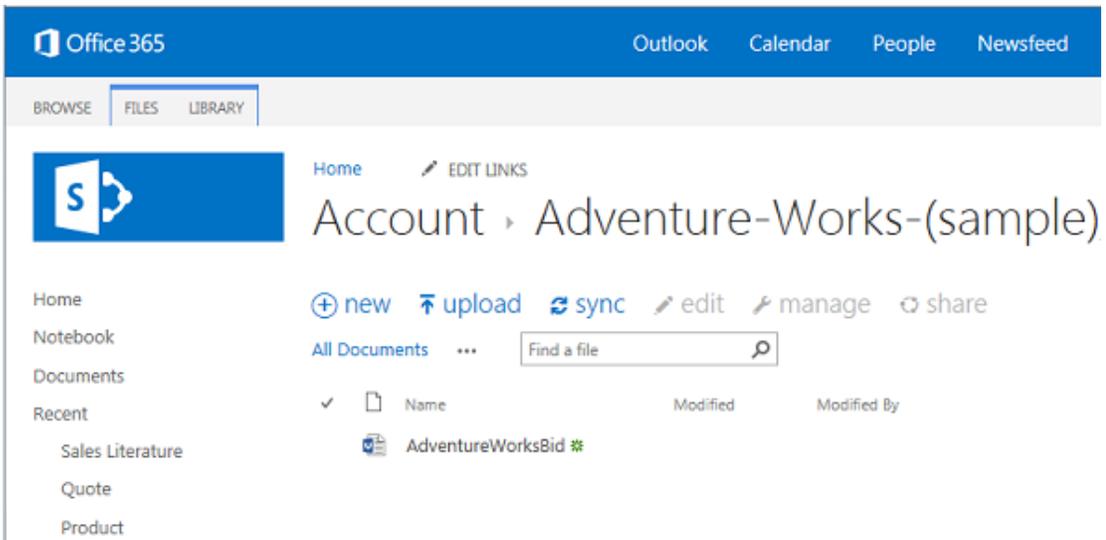
5. Click or tap **Upload**, and then browse to a document to upload to the new folder in your Microsoft Office 365 SharePoint Online Team site.



6. The document is now part of your Microsoft Dynamics CRM Online documents list. To see the document in your Microsoft Office 365 SharePoint Online Team site, click or tap **Open SharePoint**.

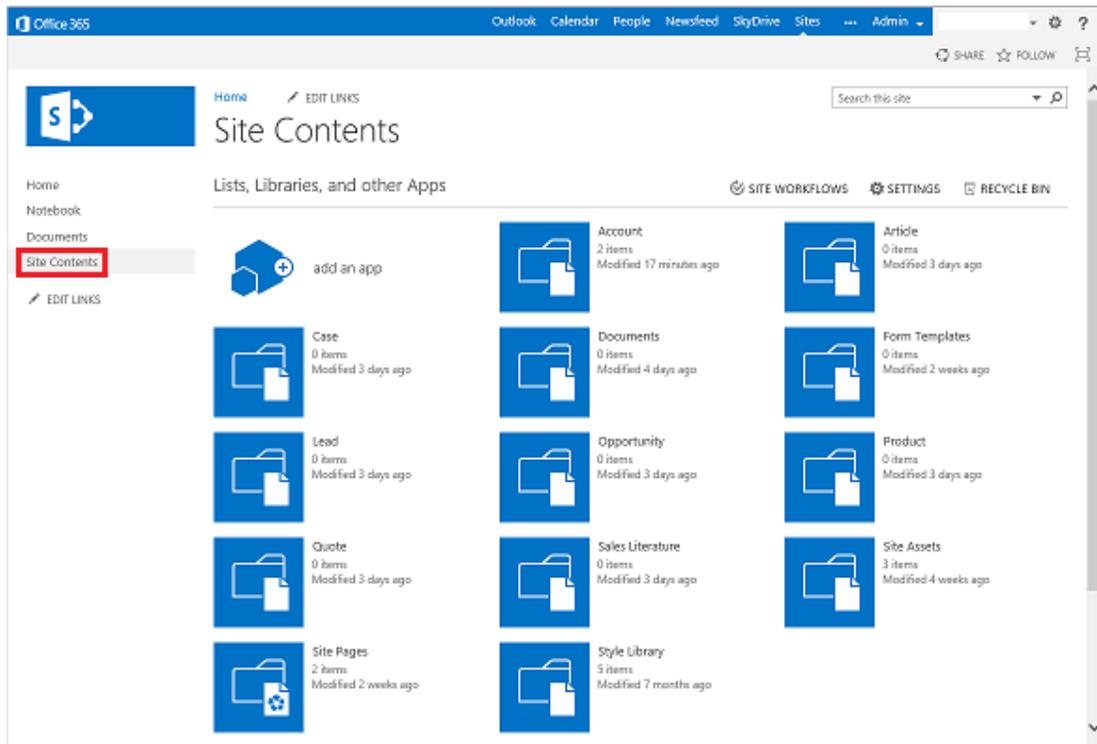


The document is now in your Microsoft Office 365 SharePoint Online Team site.



7. Click or tap **Site Contents** to see all the document libraries created for the managed entities you selected.

The entities you selected to be managed by Document Management appear as document libraries (for example: Account, Article, Case, Lead, Opportunity, Product, Quote, and Sales Literature).



More information: [Manage SharePoint documents from within Microsoft Dynamics CRM](#)

See Also

SharePoint Document Management software requirements for Microsoft Dynamics CRM 2013

Server-based SharePoint integration

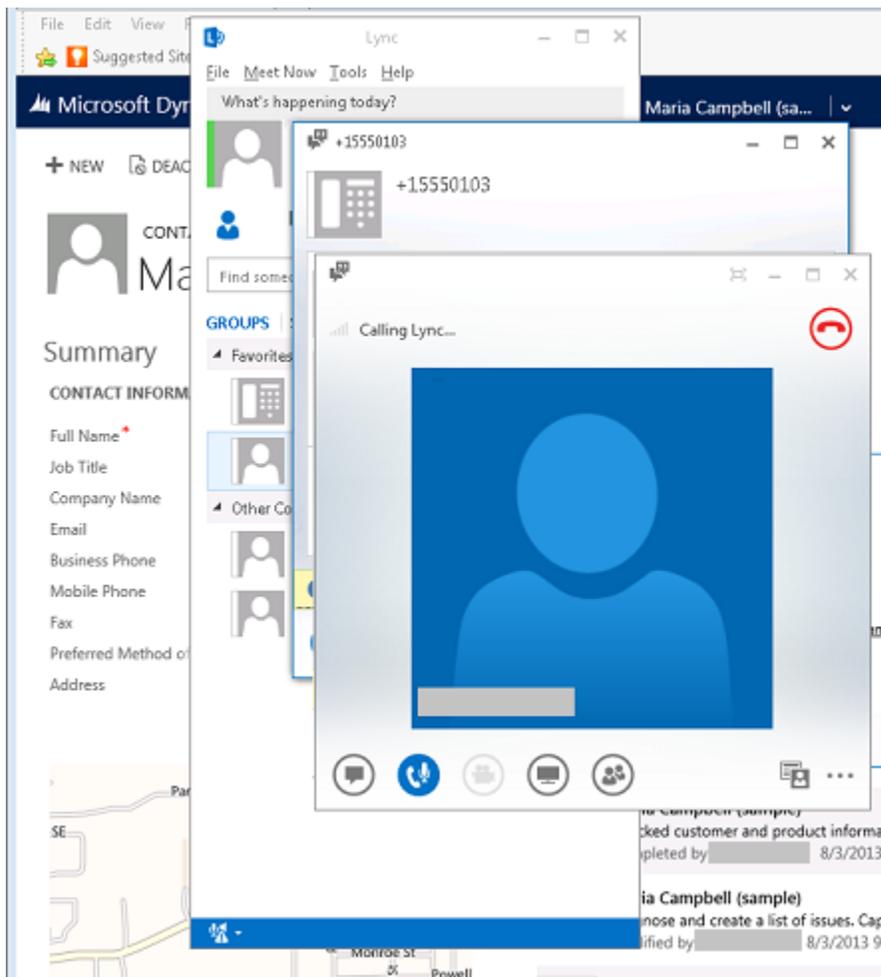
[SharePoint Online for IT pros](#)

[SharePoint and CRM](#)

Set up CRM Online to use Lync Online

When you use Lync Online and Microsoft Dynamics CRM Online, your organization can benefit from these capabilities:

- Real-time communications with customers, colleagues, and team members without leaving Microsoft Dynamics CRM.
- Track meetings as Activities in Microsoft Dynamics CRM.
- Get Presence information for members of the same email domain you are signed in with in Lync. For example, if you are signed in on Lync with someone@contoso.com, you will see presence for other @contoso.com members.



Making a Lync call within CRM Online.

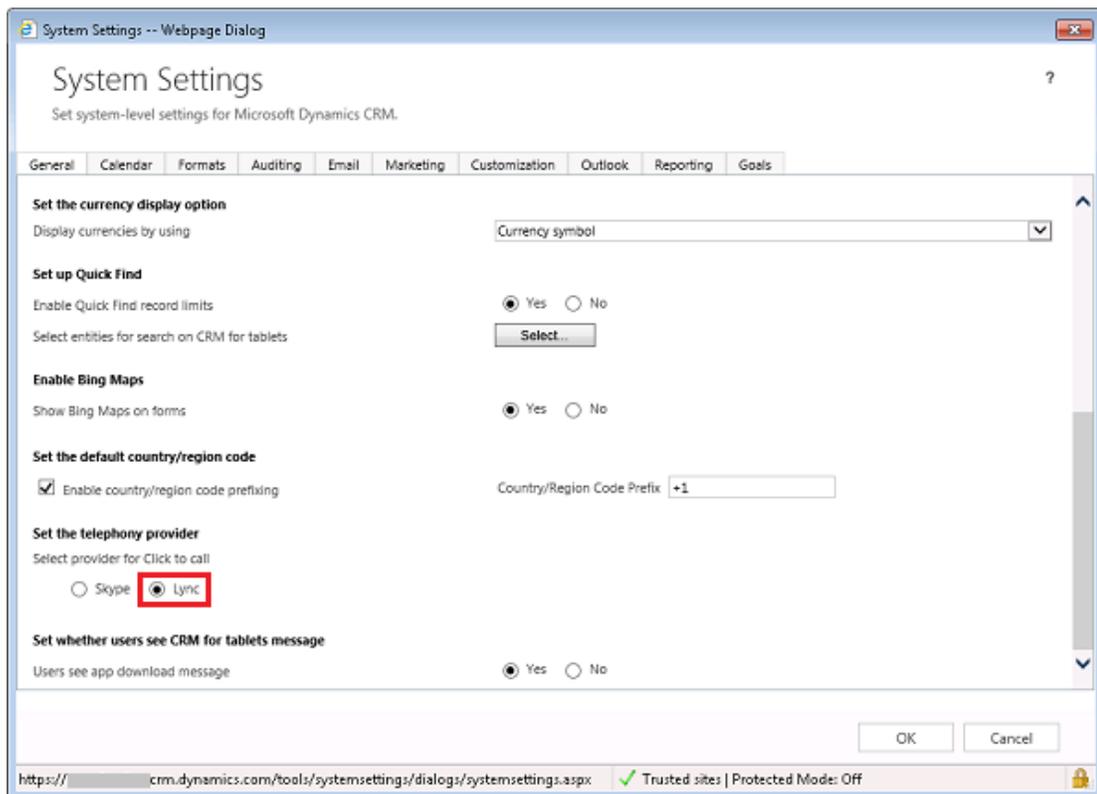
Important

Making Lync calls requires Lync Online Plan 3.

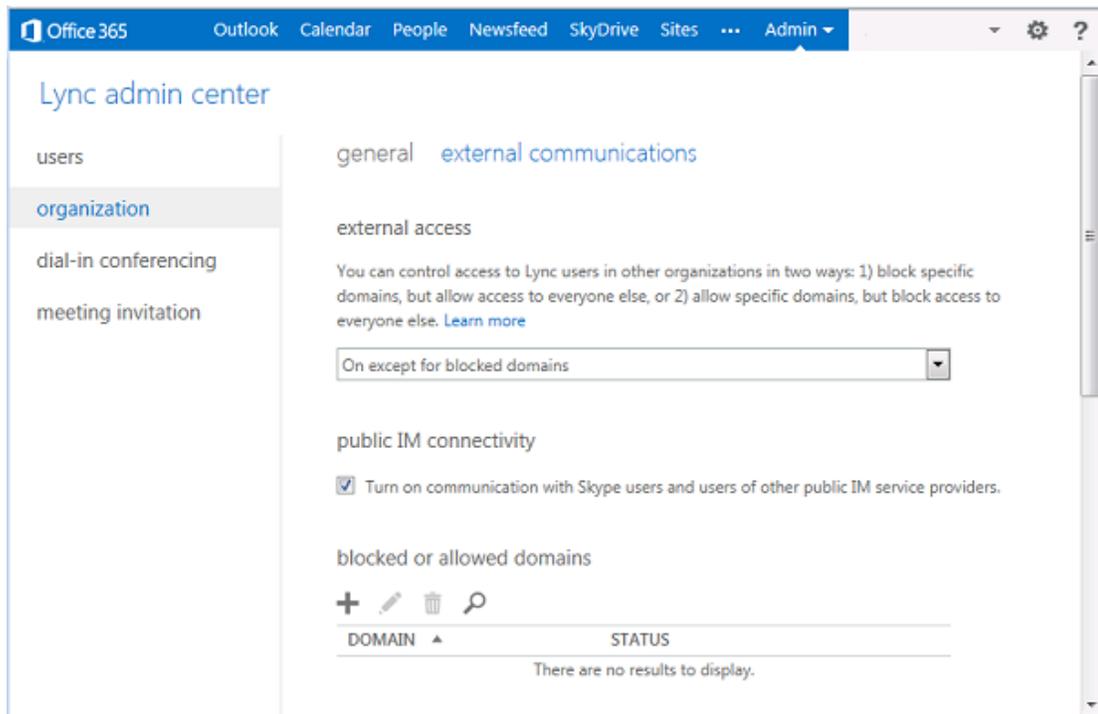
Set up Lync in Microsoft Dynamics CRM Online



1. Verify that IM presence is enabled in Microsoft Dynamics CRM. Go to **Settings > Administration > System Settings > General tab**.



3. If you have not already done so, [install Lync](#) and sign in.
4. Also, add the following as trusted sites in your browser:
 - https://*.dynamics.com
 - https://*.lync.com
 - https://*.sharepoint.com
 - <https://login.microsoftonline.com>
5. Browse to the Office 365 portal (<https://portal.microsoftonline.com>) and sign in using Global administrator credentials.
6. On the Office 365 admin center page, click or tap **Admin > Lync > organization**.
7. Click or tap **external communications**. Change the settings to allow for external access and then click or tap **Save**.

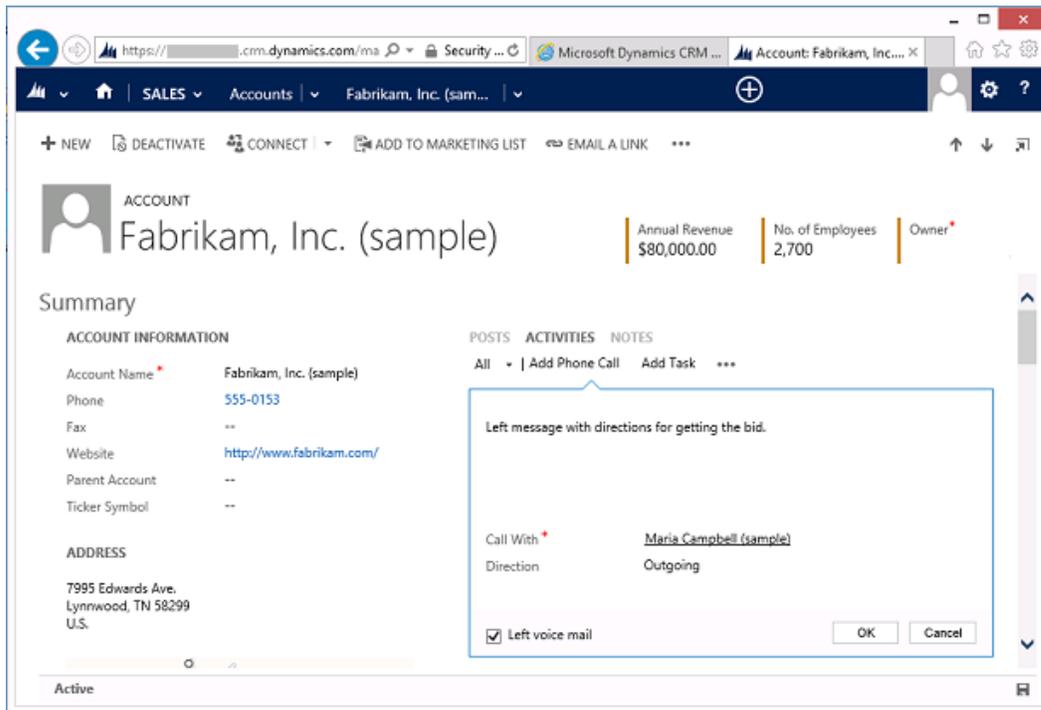


Note

Presence information is shown for members of the same email domain you are signed in with in Lync. For example, if you are signed in Lync with someone@example.com, you will see presence for other @contoso.com users.

Tracking Lync calls

Now that Lync is setup, your Lync calls are tracked as activities.



See Also

Lync and Skype integration with Microsoft Dynamics CRM 2013

[Lync Online for IT Pros](#)

[Microsoft Dynamics CRM 2013 – Configuring and using Click-to-Call with Lync](#)

[Skype and Lync](#)

Set up CRM Online to use Social Listening

For information on integrating Microsoft Social Listening with CRM Online, see [Social Listening Help Center](#).

Set up CRM Online to use Dynamics Marketing

For information on integrating Microsoft Dynamics Marketing with CRM Online, see [Marketing Setup & Administration](#).

Set up CRM Online to use Yammer

Yammer empowers employees to be more productive and successful by enabling them to collaborate easily, make decisions faster, and self-organize into teams to take on any business challenge. It's a natural fit for Microsoft Dynamics CRM Online.

Check out the following for a quick introduction to Yammer:

- Video: [Microsoft Dynamics CRM December 2012 Service Update "What's New" - Yammer](#) – 8:26
- Video: [CRM + Yammer - Light a Fire Under Your Business](#) – 4:06
- [About Yammer](#)



Note

A Yammer Enterprise subscription is required for Microsoft Dynamics CRM. A Yammer Enterprise subscription is included with [Office 365 E plans](#).

Activate Yammer in the Office 365 admin center

You begin connecting Yammer to Microsoft Dynamics CRM Online by completing the following steps in Office 365:

1. Add and verify your company domain with Office 365.
2. Assign a Global administrator to your company domain.
3. Activate Yammer Enterprise from the Office 365 Dashboard.

Yammer requires a company domain, such as contoso.com, to activate. [Registering your company domain with Office 365](#) is beyond the scope of a typical trial experience and thus will not be included in this guide. You can review and familiarize yourself with the process as described in the [Yammer Activation Guide](#).

Connect Microsoft Dynamics CRM Online to Yammer

With a Yammer account created and activated, you can connect Microsoft Dynamics CRM Online to Yammer.



1. Browse to your Microsoft Dynamics CRM Online web application and sign in as a system administrator.
2. Follow the steps for the app you're using.

If using the CRM web application

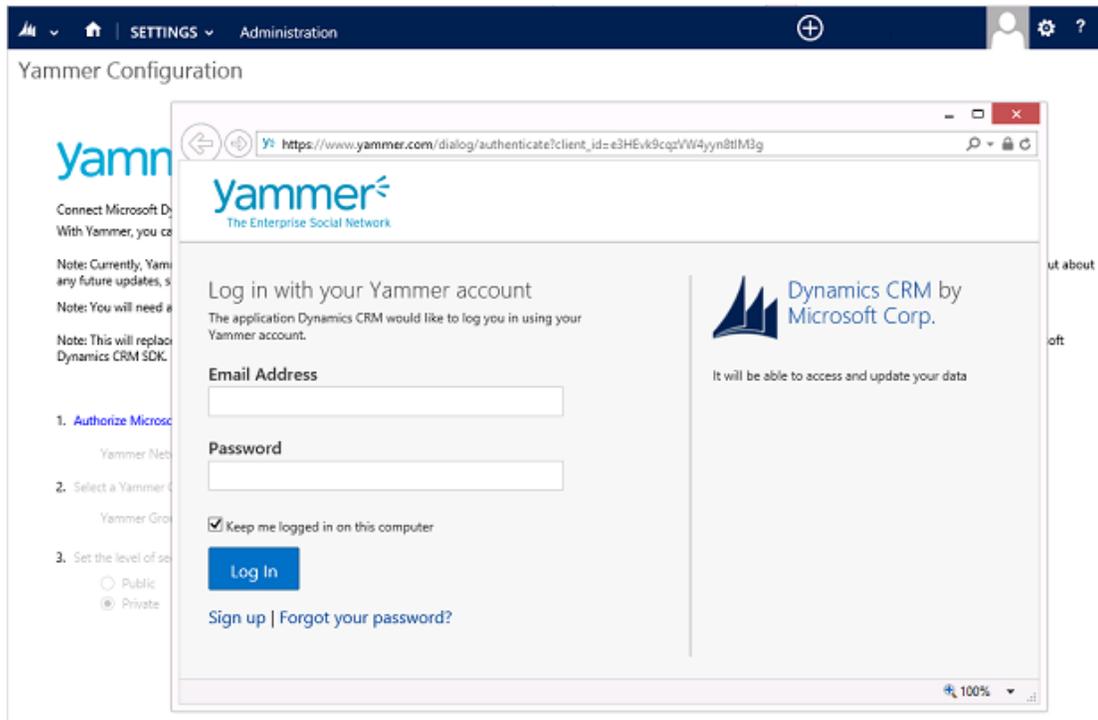
- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

Settings appears on the nav bar.

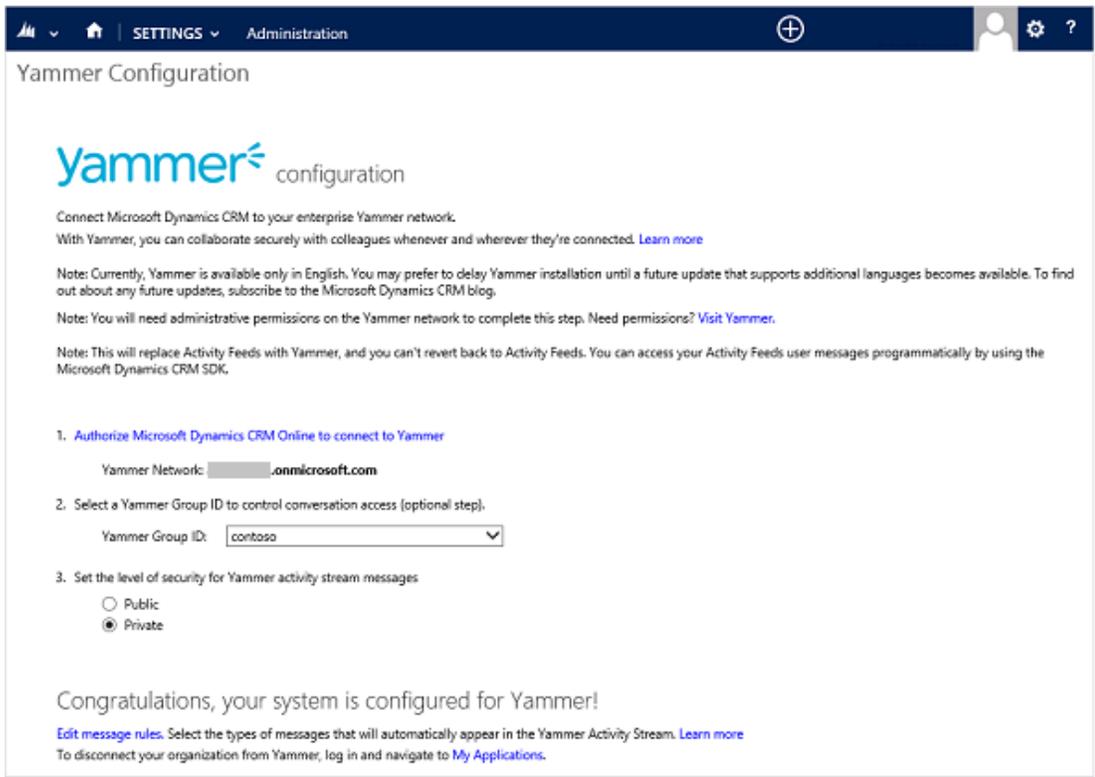
- b. Click or tap **Settings > Administration**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**.
3. Click or tap **Yammer Configuration**.
4. Read the disclaimer, and then click or tap **Continue**.
5. On the Yammer Configuration page, click or tap **Authorize Microsoft Dynamics CRM Online to connect to Yammer**.
6. Sign in to your enterprise Yammer account using your administrator credentials.



7. Select your Yammer Group ID and security level.

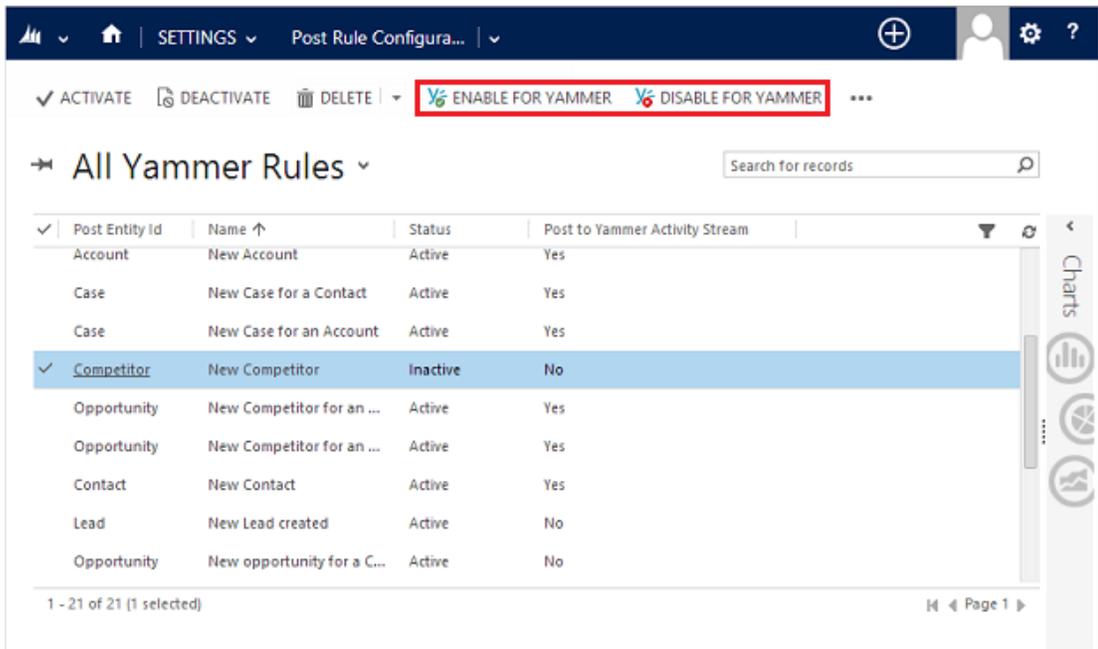


8. To enable record types and rules to automatically trigger a Yammer post, click or tap **Edit message rules**.

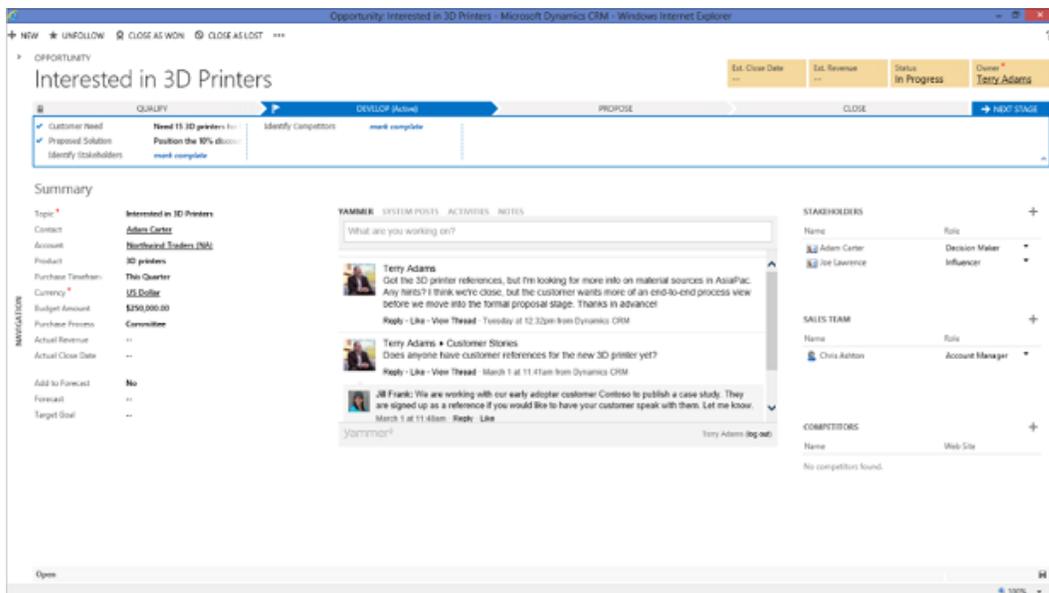
Congratulations, your system is configured for Yammer!

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

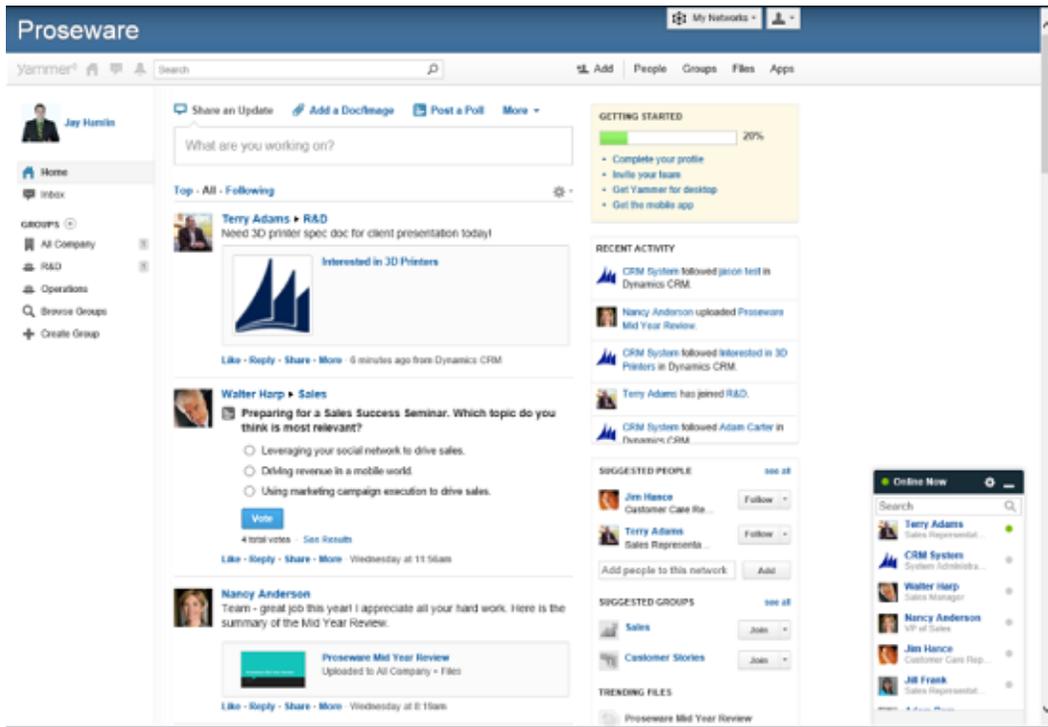
9. To trigger Yammer posts, enable or disable rules.



Yammer posts are now part of Microsoft Dynamics CRM Online.



As well as in your Yammer feed.

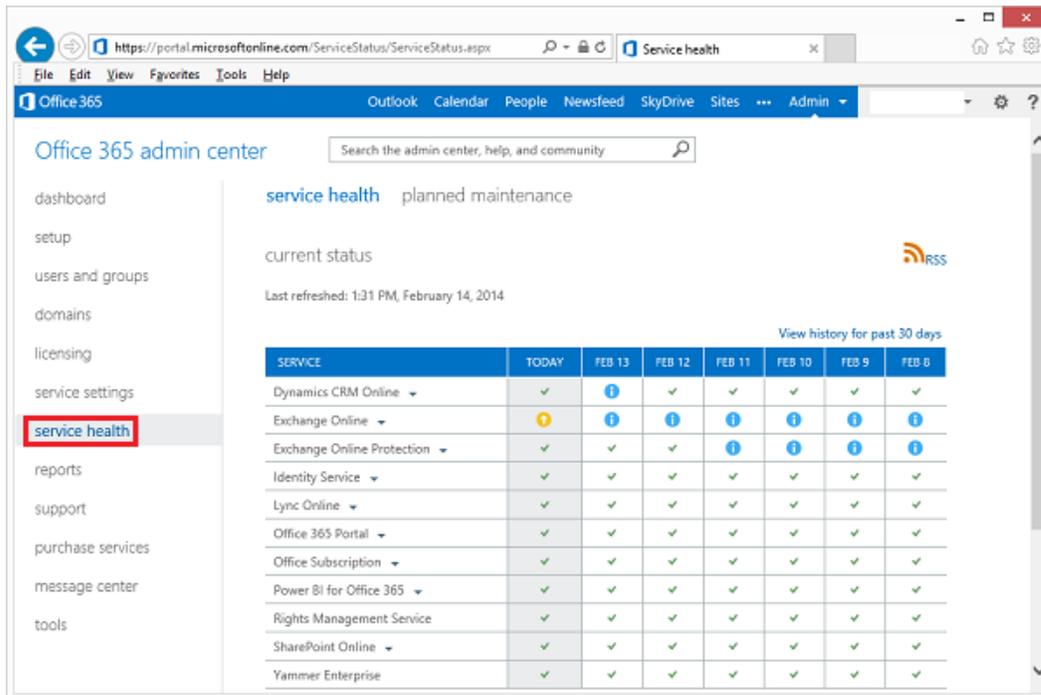


See Also

- [Collaborate and communicate with Yammer](#)
- [Connect Microsoft Dynamics CRM to Yammer](#)
- [Yammer Success Center: Microsoft Dynamics](#)
- [Activate Yammer for your organization](#)
- [Upgrade your network to Yammer Enterprise](#)
- [Yammer](#)

Check your Office 365 service health

You can quickly get real-time status of all your Office 365 services.



To see if any events are planned for your subscription, click or tap the **planned maintenance** tab.

Additional resources

The following are additional resources for Office 365 and for integrating Microsoft Dynamics CRM Online and Office 365.

Office 365 Community site

Your first stop when you need information about Office 365 should be the Community site, located at <http://community.office365.com>. The online wikis contain updates directly from the product team that are published in advance of online documentation updates. The Forums are monitored by Microsoft support staff and Office 365 experts, such as Office 365 MVPs. There are also links to articles, webcasts, and other useful resources.

Office 365

- [Office 365 Enterprise E3](#)
- [Office 365 Guides](#)
- [Deployment Resources for Office 365](#)
- [Office 365 deployment guide](#)

- [Office 365 for IT pros](#)
- [Microsoft Lystavlen - the Online display](#)

Microsoft Dynamics CRM

- [Microsoft Dynamics CRM Online Deployment and Administration Guide](#)
- [Blogs](#)
- [Forums](#)
- [End user information](#)
- [IT Pro/Admin information](#)
- [Developer information](#)
- [For Microsoft Partners](#)

Additional resources

Demo videos

- [Office 365 and Dynamics CRM Online - better together](#) – 1:19:08
- [Dynamics CRM Online & Office 365 for Microsoft Partners](#) – 57:09
- [Enabling HR Self Service and Case Resolution with Microsoft SharePoint and Microsoft Dynamics CRM](#) – 9:37
- [Office 365 feature selection](#) – 2:53
- [Introducing Office 365 Enterprise](#) – 3:05

Labs

- [Ignite](#)
- [Microsoft Virtual Academy](#)

Send us feedback about this document

We appreciate hearing from you. To send your feedback, click the following link and type your comments in the message body.



Note

The subject-line information is used to route your feedback. If you remove or modify the subject line, we may be unable to process your feedback.

[Send feedback](#)