

# Microsoft Dynamics CRM Server Implementation Questionnaire and Documentation

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## Introduction

This document contains all of the information necessary for a successful installation of CRM server. The questionnaire is to be completed by the staff preparing your infrastructure to support the CRM deployment. Once the questionnaire has been completed and returned, PowerObjects will have all that is needed to begin your project.

Topics included in this document:

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## Installation Questionnaire

<b>Environment Type</b> Please complete one form for each environment specified in your Statement of Work	<input type="checkbox"/> Production <input type="checkbox"/> Test/Certification <input type="checkbox"/> Development
<b>Deployment Topology</b> <a href="#">more info</a>	<input type="checkbox"/> Small Deployment <input type="checkbox"/> Medium Deployment <input type="checkbox"/> Enterprise Deployment Note: Changes to requirements in PSOW will require change order.
<b>Internet Facing Deployment</b> <a href="#">more info</a>	<input type="checkbox"/> Yes, new ADFS Server <input type="checkbox"/> Yes, existing ADFS Server Server name: <input type="checkbox"/> No
<b>Email Integration</b>	<input type="checkbox"/> Email Router <a href="#">more info</a> <input type="checkbox"/> Server Side Sync <a href="#">more info</a> <input type="checkbox"/> None
<b>Microsoft Dynamics CRM License Key</b>	
<b>Desired Organization Name</b> Will be used in application url. Indicating "CRM" will make your application url https://crm.yourcompany.com	
<b>Additional Deployment Administrators to include (domain/user)</b>	
<b>Domain User ID for Installation (domain\user)</b>	
<b>Domain User Password for Installation</b>	
<b>Remote Access Connection Instructions</b>	
<b>CRM Server Name</b>	
<b>Installation User has Adequate Server Privilege?</b> <a href="#">more info</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>CRM Server Role</b>	<input type="checkbox"/> Full Server <input type="checkbox"/> Front End/Web and Deployment Admin Server <input type="checkbox"/> Back End/Async Processing Server
<b>Dedicated to CRM?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No Other applications using this server:
<b>Application Service Account</b> <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password

Deployment Web Service Account <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password
Sandbox Processing Account <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password
Asynchronous Processing Service Account <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password
VSS Writer Service Account <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password
Monitoring Service Account <a href="#">more info</a>	<input type="checkbox"/> Network Service <input type="checkbox"/> Domain User Domain user name Domain user password
Active Directory Organizational Unit for CRM groups. Please indicate full path.	
Installation User has Adequate Privilege to AD? <a href="#">more info</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
SQL Server Name/Instance	
Installation User has Adequate SQL Privilege? <a href="#">more info</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
SQL Reporting Services Server Name <a href="#">SQL Reporting Services Requirements</a>	
Dedicated to CRM?	<input type="checkbox"/> Yes <input type="checkbox"/> No Other applications using this server:
During our installation we need to install CRM Reporting Extensions, are there any concerns?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Email Router Server Name <a href="#">Email Router Requirements</a>	
Outgoing Server Type	<input type="checkbox"/> Exchange Online <input type="checkbox"/> SMTP

SMTP or Exchange Online Address	
SMTP or Exchange Port if non standard	
SMTP or Exchange Online Authentication	<input type="checkbox"/> Anonymous <input type="checkbox"/> Clear Text <input type="checkbox"/> Other User Name Password
Server Side Sync Type <a href="#">Server Side Sync Requirements</a>	<input type="checkbox"/> Exchange Server <input type="checkbox"/> POP3 and SMTP
Server Side Sync Incoming Server address	
Server Side Sync Outgoing Server address	
Exchange Authentication Method	<input type="checkbox"/> Each user will add their mailbox credentials to their CRM mailbox record <input type="checkbox"/> A single user who has impersonation or delegation permission on all mailboxes User Name Password <input type="checkbox"/> Set up for impersonation <input type="checkbox"/> Set up for delegation
POP3/SMTP Authentication Method	<input type="checkbox"/> Each user will add their mailbox credentials to their CRM mailbox record <input type="checkbox"/> Window Integrated Authentication (Asynchronous Processing Service Account) <input type="checkbox"/> Anonymous
Internet Facing Deployment ADFS Server Name <a href="#">Internet Facing Deployment Requirements</a>	
Wildcard SSL Certificate Location	
If a file, password to export private key	Password
Will there be any ADFS Proxies?	<input type="checkbox"/> Yes, in a DMZ <input type="checkbox"/> Yes, somewhere else <input type="checkbox"/> No
List all ADFS Proxies	
Client Contact for creating DNS records	Name Email Phone

## Upgrade Questionnaire

Current CRM Server (front end/web if multiple)	
Installation Account has server access and is a Deployment Administrator?	<input type="checkbox"/> Yes <input type="checkbox"/> No <a href="#">please add, here's how</a>
Current CRM SQL Server	
Installation Account has server access and is a sysadmin?	<input type="checkbox"/> Yes <input type="checkbox"/> No please add
Current Production CRM URL	
Installation Account has access and has the System Administrator role?	<input type="checkbox"/> Yes <input type="checkbox"/> No <a href="#">please add, here's how</a>

## Additional CRM Server Information for Multi-Server Deployments

CRM Server Name	
Installation User has Adequate Server Privilege? <a href="#">more info</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
CRM Server Role	<input type="checkbox"/> Front End/Web and Deployment Admin Server <input type="checkbox"/> Back End/Async Processing Server
Dedicated to CRM?	<input type="checkbox"/> Yes <input type="checkbox"/> No Other applications using this server:
CRM Server Name	
Installation User has Adequate Server Privilege? <a href="#">more info</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
CRM Server Role	<input type="checkbox"/> Front End/Web and Deployment Admin Server <input type="checkbox"/> Back End/Async Processing Server
Dedicated to CRM?	<input type="checkbox"/> Yes <input type="checkbox"/> No Other applications using this server:
Dedicated to CRM?	<input type="checkbox"/> Yes <input type="checkbox"/> No Other applications using this server:



## Important Considerations for Upgrades

Customers wishing to upgrade their Microsoft Dynamics CRM 2011 deployments to the latest version of Microsoft Dynamics will need to have applied Update Rollup 14 (5.0.9690.3557) or later to their 2011 organizations. If this is a concern, please discuss the options with your project team.

Customers wishing to upgrade their Microsoft Dynamics CRM 2013 deployments to the latest version of Microsoft Dynamics will need to have applied Service Pack 1 (6.1.0000.0581) or later to their 2013 organizations. If this is a concern, please discuss the options with your project team.

While Microsoft continues to support the email router and the Outlook client, these applications are expected to be retired in future versions. The replacement for the email router is Server Side Sync and the replacement for the Outlook client is the Dynamics App for Outlook which is configured by your CRM Administrator. Server Side Sync supports a wide array of Microsoft Exchange Server versions, but the Dynamics App for Outlook requires Exchange 2016 or Exchange Online.

As Microsoft reimagines and rebrands the Microsoft Dynamics CRM product line, the names we use can lead to confusion, especially around the “365” products. Please refer to the table below for some clarification.

Friendly Name	Highest Product Version (at time of doc)	Notes
Microsoft Dynamics CRM 2011	5.0.9690.4376	Also known as five-oh
Microsoft Dynamics CRM 2013	6.0.0003.0106	Also known as six-oh
Microsoft Dynamics CRM 2013 SP1	6.1.5.111	Also known as 2013 SP1
Microsoft Dynamics CRM 2015	7.0.3.109	Also known as seven-oh
Microsoft Dynamics CRM 2016	8.0.1.79	The base product
Microsoft Dynamics CRM 2016 SP1	8.1.1.1005	Also known as 2016 SP1
Microsoft Dynamics 365 v 8.2	8.2.3.0008	Also known as eight-point-two
Microsoft Dynamics 365 for Customer Engagement v 9.0	9.00.0002.3034	Also known as nine-oh <i>Microsoft drops support of all Windows Server and SQL Server versions lower than 2016.</i>

## A Word about Requirements

When deciding upon versions for your server operating system, database server, client operating system, client Microsoft Office versions, and client browser it is best practice to run the most recently released and supported version. Your CRM system may outlive the product lifecycle of the products upon which it depends, limiting your access to product patches and support. Additionally, Microsoft may drop support for older versions (such as Windows 2008 Server, Microsoft SQL Server 2008) as CRM product updates are released.



## Microsoft Dynamics CRM 2011 Server Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM Server 2011 running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, Microsoft SharePoint, or Microsoft Exchange Server are **not** installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2-GB RAM	8-GB RAM or more
Hard disk	10 GB of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.
Active Directory Modes	Windows 2000 Mixed Windows 2000 Native Windows Server 2003 Interim Windows Server 2003 Native Windows Server 2008 Interim Windows Server 2008 Native	
Operating System	Windows Server 2012 R2 Windows Server 2012 Datacenter Windows Server 2012 Standard Windows Server 2008 Standard (x64 versions) SP2 or later version Windows Server 2008 Enterprise (x64 versions) SP2 or later version Windows Server 2008 Datacenter (x64 versions) SP2 or later version Windows Web Server 2008 (x64 versions) SP2 or later version Windows Small Business Server 2008 Premium x64 or later version Windows Small Business Server 2008 Standard x64 or later version * Windows Server 2003 family is <b>not</b> supported for CRM 2011 * CRM 2011 cannot be installed in Server Core mode	
Virtualization	Microsoft Dynamics CRM servers can be deployed in a virtualized environment by using Windows Server 2008 or Windows Server 2012 with Hyper-V or virtualization solutions from vendors who participate in the Microsoft Windows Server Virtualization Validation Program (SVVP).	
Web Services	Internet Information Server 7	
Windows Components	Indexing Service (Windows Server 2008) Windows Search Service (Windows Server 2012) Windows Data Access Components (MDAC) 6.0 Microsoft ASP.NET (registered but does not have to be running)	



Component	Minimum	Recommended
Components Verified or Added During Installation	Microsoft .NET Framework Windows Identity Foundation Windows Azure Platform AppFabric SDK 1.0 Microsoft SQL Reporting Service Report Viewer Control SQL Native Client	

The minimum and recommended requirements are based on 320-user load simulation tests.

## Microsoft Dynamics CRM 2013 Server Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM 2013 Server running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2-GB RAM	8-GB RAM or more
Hard disk	10 GB of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.
Active Directory Modes	Windows Server 2003 Interim Windows Server 2003 Native Windows Server 2008 Interim Windows Server 2008 Native Windows Server 2012	





Component	Minimum	Recommended
Operating System	Windows Server 2012 R2 Windows Server 2012 Datacenter Windows Server 2012 Standard Windows Server 2008 Standard (x64 versions) SP2 or later version Windows Server 2008 Enterprise (x64 versions) SP2 or later version Windows Server 2008 Datacenter (x64 versions) SP2 or later version Windows Web Server 2008 (x64 versions) SP2 or later version * Windows Server 2008 installed by using the Server Core installation option is not supported for installing and running Microsoft Dynamics CRM 2013 Server * Windows Server 2008 for Itanium-based systems is not supported for installing and running Microsoft Dynamics CRM 2013 Server. * Windows Small Business Server 2011 is not supported for installing and running Microsoft Dynamics CRM 2013 Server.	
Virtualization	Microsoft Dynamics CRM servers can be deployed in a virtualized environment by using Windows Server 2008 or Windows Server 2012 with Hyper-V or virtualization solutions from vendors who participate in the Microsoft Windows Server Virtualization Validation Program (SVVP).	
Windows Components	Indexing Service (Windows Server 2008) Windows Search Service (Windows Server 2012) Windows Data Access Components (MDAC) 6.0 Microsoft ASP.NET (registered but does not have to be running)	
Components Verified or Added During Installation	Microsoft .NET Framework (Windows Server 2008) Windows Identity Foundation (Windows Server 2008) Windows Azure Platform AppFabric SDK 1.0 (Windows Server 2008) Microsoft Application Error Reporting Microsoft SQL Reporting Service Report Viewer Control SQL Native Client	
Web Services	Internet Information Server 7 or 8	

The minimum and recommended requirements are based on 320-user load simulation tests.

## Microsoft Dynamics CRM 2015 Server Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM 2015 Server running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems



Component	Minimum	Recommended
Memory	2-GB RAM	8-GB RAM or more
Hard disk	10 GB of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.
Active Directory Modes	Windows Server 2008 Interim Windows Server 2008 Native Windows Server 2012 * Windows Server 2003 and earlier Active Directory Modes are not supported for CRM 2015.	
Operating System	Windows Server 2012 R2 Windows Server 2012 R2 Datacenter Windows Server 2012 Standard * Windows Server 2008 and earlier are not supported for CRM 2015.	
Virtualization	Microsoft Dynamics CRM servers can be deployed in a virtualized environment by using Windows Server 2012 with Hyper-V or virtualization solutions from vendors who participate in the Microsoft Windows Server Virtualization Validation Program (SVVP).	
Windows Components	Windows Search Service (Windows Server 2012) Windows Data Access Components (MDAC) 6.0 Microsoft ASP.NET (registered but does not have to be running)	
Components Verified or Added During Installation	Microsoft .NET Framework Windows Identity Foundation Windows Azure Platform AppFabric SDK 1.0 Microsoft Application Error Reporting Microsoft SQL Reporting Service Report Viewer Control SQL Native Client	
Web Services	Internet Information Server	

The minimum and recommended requirements are based on 320-user load simulation tests.

## Microsoft Dynamics CRM 2016/Dynamics 365 8.2 Server Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM 2016 Server running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.



Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	4-GB RAM	16-GB RAM or more
Hard disk	10 GB of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.
Active Directory Modes	Windows Server 2008 Windows Server 2008 R2 Windows Server 2012 Windows Server 2012 R2 * Windows Server 2003 and earlier Active Directory Modes are not supported for CRM 2016.	
Operating System	Windows Server 2012 R2 Standard Windows Server 2012 R2 Datacenter Windows Server 2012 Standard Windows Server 2016 Standard Windows Server 2016 DataCenter * Windows Server 2008 and earlier are not supported for CRM 2016. Windows Server 2012 Foundation, Essentials and Small Business Server Editions are also not supported.	
Virtualization	Microsoft Dynamics CRM servers can be deployed in a virtualized environment by using Windows Server 2012 with Hyper-V or virtualization solutions from vendors who participate in the Microsoft Windows Server Virtualization Validation Program (SVVP).	
Windows Components	Windows Search Service Windows Data Access Components (MDAC) Microsoft ASP.NET (registered but does not have to be running)	
Components Verified or Added During Installation	Microsoft .NET Framework Windows Identity Foundation Windows Azure Platform AppFabric SDK 1.0 Microsoft Application Error Reporting Microsoft SQL Reporting Service Report Viewer Control SQL Native Client	
Web Services	Internet Information Server 8.0 and 8.5	

The minimum and recommended requirements are based on 320-user load simulation tests.



## Microsoft Dynamics 365 9.0 Server Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics 365 version 9.0 Server running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	4-GB RAM	16-GB RAM or more
Hard disk	10 GB of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space <b>Note</b> Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.
Active Directory Modes	Windows Server 2008 Windows Server 2008 R2 Windows Server 2012 Windows Server 2012 R2 * Windows Server 2003 and earlier Active Directory Modes are not supported for CRM 2016.	
Operating System	Windows Server 2016 Standard Windows Server 2016 DataCenter * Windows Server 2012 and earlier are not supported for Dynamics 365 version 9.0, Windows 2016 Essentials is also not supported.	
Virtualization	Microsoft Dynamics CRM servers can be deployed in a virtualized environment by using Windows Server 2016 with Hyper-V or virtualization solutions from vendors who participate in the Microsoft Windows Server Virtualization Validation Program (SVVP).	
Windows Components	Windows Search Service Windows Data Access Components (MDAC) Microsoft ASP.NET (registered but does not have to be running)	
Components Verified or Added During Installation	Microsoft .NET Framework Windows Identity Foundation Windows Azure Platform AppFabric SDK 1.0 Microsoft Application Error Reporting Microsoft SQL Reporting Service Report Viewer Control SQL Native Client	
Web Services	Internet Information Server 10	

The minimum and recommended requirements are based on 320-user load simulation tests.



## Microsoft SQL Server and SQL Reporting Services Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft SQL Server. These requirements assume that additional components such as Microsoft Dynamics CRM Server, Microsoft SQL Server Reporting Services, Microsoft SharePoint, or Microsoft Exchange Server are **not** installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	4-GB RAM	16-GB RAM or more
Hard disk	SAS RAID 5 or RAID 10 hard disk array	SAS RAID 5 or RAID 10 hard disk array
Virtualization	See SQL Server requirements table for your deployed version. While virtualization is supported, we prefer physical servers.	
SQL Server Components	SQL word breakers (if using CRM language editions) SQL Agent Service SQL Server full-text indexing	
Features Supported	Named Instances AlwaysOn Failover Cluster Instances AlwaysOn Availability Groups SSRS Load Balancing	
SQL Reporting Services Mode	Native Mode *SharePoint Mode is not supported with CRM.	

The minimum and recommended requirements are based on 320-user load simulation tests.

## Microsoft Dynamics CRM and Microsoft SQL Server Version

Please refer to the table below for compatibility combinations of Microsoft Dynamics CRM and Microsoft SQL Server/Microsoft SQL Reporting Services. Below the table is a list of the Microsoft SQL server products supported for each SQL version.

CRM Version	Microsoft SQL Server 2008 *	Microsoft SQL Server 2012	Microsoft SQL Server 2014	Microsoft SQL Server 2016
CRM 2011	Supported	Supported	Not Supported	Not Supported
CRM 2013	Supported	Supported	Supported	Not Supported
CRM 2015	Not Supported	Supported	Supported	Not Supported
CRM 2016 Dynamics 365 8.2	Not Supported	Supported	Supported	Supported
Dynamics 365 9.0	Not Supported	Not Supported	Not Supported	Supported



- Microsoft SQL Server 2008, Standard Edition, x64 SP3 or R2 SP2
- Microsoft SQL Server 2008, Enterprise Edition, x64 SP3 or R2 SP2
- Microsoft SQL Server 2008 Datacenter x64 SP3 or R2 SP2
- Microsoft SQL Server 2008 Developer x64 SP3 or R2 SP2 (for non-production environments only)
- Microsoft SQL Server 2012, Enterprise, 64-bit SP1
- Microsoft SQL Server 2012, Business Intelligence, 64-bit SP1
- Microsoft SQL Server 2012, Standard, 64-bit SP1
- Microsoft SQL Server 2014, Enterprise, 64-bit
- Microsoft SQL Server 2014, Business Intelligence 64-bit
- Microsoft SQL Server 2014, Standard, 64-bit
- Microsoft SQL Server 2014, Developer, 64-bit (for non-production use only)
- Microsoft SQL Server 2016, Standard, 64-bit with CU2
- Microsoft SQL Server 2016, Enterprise, 64-bit with CU2
- Microsoft SQL Server 2016, Developer, 64-bit with CU2 (for non-production use only)

- \* 32-bit versions of SQL Server 2008 are not supported
- \* MS SQL Server Workgroup, Web, Compact or Express Edition are not supported

## Microsoft Dynamics CRM Server Internet Facing Deployment

Microsoft Dynamics CRM Server Internet Facing Deployment (IFD) requires use of a Security Token Service (STS). PowerObjects recommends Microsoft Active Directory Federation Services (ADFS).

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	4-GB RAM	16-GB RAM or more
Hard disk	SAS RAID 5 or RAID 10 hard disk array	SAS RAID 5 or RAID 10 hard disk array
STS Service	Microsoft ADFS 2.0 Microsoft ADFS 2.1 Microsoft ADFS 3.0 *ADFS 2016 is not currently supported with any version of CRM.	
SSL Certificate	Wildcard SSL Certificate for the public domain, registered with a public certificate authority. Wildcard SSL will be used on all CRM Front End Servers and on ADFS Server	

Component	Minimum	Recommended
DNS Records	Internal and external DNS records will be required for multiple host names  Sample Records: https://extauth.mycompany.com https://intauth.mycompany.com https://discover.mycompany.com https://deploy.mycompany.com https://crm.mycompany.com https://adfslogin.mycompany.com  *CNAME records are not supported, IFD configuration requires A records	
Network	Access to all CRM Front End Servers and ADFS Server on port 443.	

## Microsoft Dynamics CRM Email Router Requirements

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM Email Router. Clients running CRM 2011 will use the Email Router for email delivery to and from CRM, while clients running CRM 2013 have a choice between the Email Router and Server Side Sync.

Component	Minimum	Recommended
Processor	32 bit - 750-MHz CPU or comparable 64 bit - x64 architecture or compatible 1.5 GHz processor	32 bit - Multi-core 1.8-GHz CPU or higher 64 bit - Multi-core x64 architecture 2GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	1-GB RAM	2-GB RAM or more
Hard disk	100 MB of available disk space	100 MB of available disk space
Operating System	Windows 8.1 or Windows 8 (64-bit and 32-bit versions) (CRM 2015/CRM 2016/CRM 365 only) Windows 7 (64-bit and 32-bit versions) Windows Server 2008 (CRM 2011/2013 only) Windows Server 2008 R2 (CRM 2011/2013 only) Windows Server 2012	
MAPI client	Microsoft Exchange Server MAPI Client and Collaboration Data Objects 1.2.1	



Component	Minimum	Recommended
Mail Transport	Exchange 2003 Standard Edition SP2 or SP3 (CRM 2011 Only) Exchange 2003 Enterprise Edition SP2 or SP3 (CRM 2011 Only) Exchange Server 2007 Standard Edition (CRM 2011/2013 Only) Exchange Server 2007 Enterprise Edition (CRM 2011/2013 Only) Microsoft Exchange Server 2010 Standard Edition Microsoft Exchange Server 2010 Enterprise Edition Exchange Server 2013 (Standard and Enterprise editions) (CRM 2015/CRM 2016/CRM 365 Only) Microsoft Exchange Online POP3 Server SMTP Server (supporting RFC 2821 and RFC 2822)	
Components Verified or Added During Installation	Microsoft .NET Framework 4 Microsoft Visual C++ Redistributable Microsoft Application Error Reporting Windows Identity Framework (WIF) Windows Live ID Sign-in Assistant 6.5 Microsoft Online Services Sign-in Assistant (Required for Microsoft Dynamics CRM Online when you subscribe through Microsoft Office 365.)	

## Microsoft Dynamics CRM Server Side Sync Requirements

Microsoft Dynamics CRM Server Side Sync is configured through the CRM application; however the following items are needed to create the profiles.

- Supported Exchange Server versions to provide sync for email, contacts, appointments and tasks:
  - Exchange Server 2010 – Exchange Web Services (SP3 required for CRM 2016)
  - Exchange Server 2013 – Exchange Web Services (SP1 required for CRM 2016)
  - Exchange Server 2016 (CRM 2016/CRM 365 Only)
  - Exchange Online
- Other mail systems supported for email sync only:
  - SMTP and POP3 server access from the following providers: MSN, Outlook.com, Windows Live Mail Gmail, Yahoo! Mail.
- Incoming and Outgoing Server locations
- User credentials having impersonation or delegation permission for each mailbox using Server Side Sync.

## A Word on Multiple Domains and Trusts

Microsoft Dynamics CRM supports multiple domains trusted **within the same** forest. For the configuration of CRM, all service accounts, security groups, and the installation account must reside within the same domain as the servers.

For multi-domain trusts, the domain where CRM is running must fully trust other domains within the forest where users reside.





## Microsoft Dynamics CRM Server Services Requirements

	Application Service Account	Deployment Web Service Account	Sandbox Processing Account	Asynchronous Processing Service Account	VSS Writer Service Account (CRM 2013/2015/2016/365 only)	Monitoring Service Account (CRM 2013/2015/2016/365 only)
Domain User	Required	Required	Required	Required	Required	Required
Local Administrator	CRM and SQL Servers	CRM and SQL Servers				
Read/Write folders on CRM Servers	Trace <sup>1</sup> + CRMWeb <sup>2</sup>	Trace <sup>1</sup> + CRMWeb <sup>2</sup>	Trace <sup>1</sup>	Trace <sup>1</sup>		
SQL sysadmin		Required				
Logon As Service		Required	Required	Required	Required	Required
Performance Log Users Group (local)	Required			Required		
Read/Write Registry	MSCRM <sup>3</sup> + Sandbox Services <sup>4</sup>	MSCRM <sup>3</sup> + Sandbox Services <sup>4</sup>	MSCRM <sup>3</sup>	MSCRM <sup>3</sup> + Sandbox Services <sup>4</sup>	MSCRM <sup>3</sup>	MSCRM <sup>3</sup>
CRM_WPG Group Member	Required	Required				
IIS_USERS Group Member	Required	Required				
OU/Security Group Create in Active Directory						
CRM Active Directory Groups	PrivUser Group, SqlAccess Group	PrivUser Group, SqlAccess Group		PrivUser Group, SqlAccess Group	SqlAccess Group	SqlAccess Group



	Application Service Account	Deployment Web Service Account	Sandbox Processing Account	Asynchronous Processing Service Account	VSS Writer Service Account (CRM 2013/2015/2016/365 only)	Monitoring Service Account (CRM 2013/2015/2016/365 only)
SPN	Maybe <sup>56</sup>		Maybe <sup>7</sup>	Maybe <sup>8</sup>		Maybe <sup>9</sup>
Can be a CRM User?	No	No	No	No	No	No

Note: Managed Service Accounts are not supported at this time.

<sup>1</sup> C:\Program Files\Microsoft Dynamics CRM\ and user %AppData%

<sup>2</sup> C:\Program Files\Microsoft Dynamics CRM\

<sup>3</sup> HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\MSCRM

<sup>4</sup> HKEY\_LOCAL\_MACHINE\SYSTEM\ControlSet001\services\MSCRMSandboxService

<sup>5</sup>SPN required for AppPool identity if CRM will be accessed with a custom host name (crm.yourdomain.com), need SPN for custom name

<sup>6</sup>SPN required for AppPool identity when IIS in Web Farm. Set useAppPoolCredentials to true and create SPN for virtual host name and virtual host FQDN

<sup>7</sup>SETSPN –a MSCRMSandboxService/<ComputerName> <service account> on the computer where Sandbox Service is running

<sup>8</sup>SETSPN –a MSCRMAsyncService/<ComputerName> <service account> on the computer where ASync Service is running

<sup>9</sup>The service account may need an SPN for the URL used to access the website that is associated with it.



## Microsoft Dynamics CRM Server Installer Account Requirements

The user account used to run Microsoft Dynamics CRM Server Setup that includes the creation of databases requires the following minimum permissions:

Installer Account	
Domain User	Required
Local Administrator	CRM and SQL Servers
Read/Write folders on CRM Servers	Program Files
SQL sysadmin	Required
Read/Write Registry	Inherited with local admin account
OU/Security Group Create in Active Directory	Required*
Can be a CRM User?	Yes

\*Required unless performing command prompt installation with pre-created groups specified  
If Microsoft SQL Server Reporting Services is installed on a different server, you must add the Content Manager role at the root level for the installing user account. You must also add the System Administrator role at the site-wide level for the installing user account.

### Setting up Active Directory

For the user account of the user who is installing Microsoft Dynamics CRM, add the following permissions to the organizational unit (OU) in Active Directory. You must do this step for the OU to which you select to install during the installation of Microsoft Dynamics CRM.

Permissions Required:

- Read
- Create All Child Objects
- Advanced permissions
- Read Permissions
- Modify Permissions
- Read Members
- Write Members

To add the permissions, follow these steps:

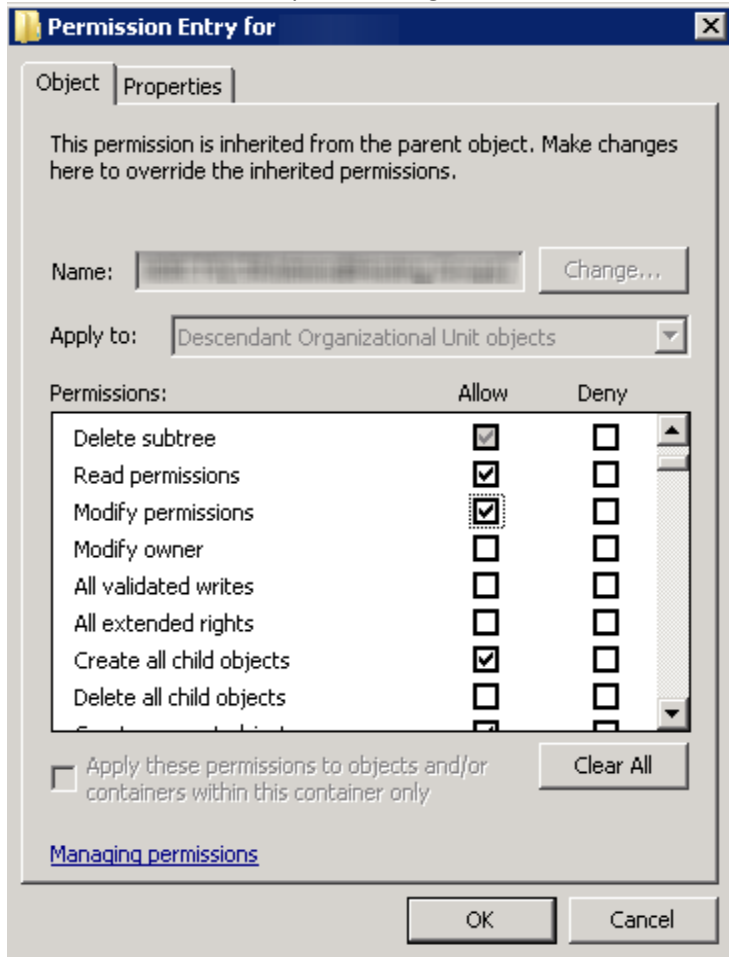
1. Log on to the domain controller server as a user who has domain administrator permissions.
2. Click Start, click Administrative Tools, and then click Active Directory Users and Computers.
3. On the View menu, click **Advanced Features**.
4. In the navigation pane, find the OU that you want to use for the Microsoft Dynamics CRM installation. To do this, expand the tree to the node that contains the security group.
5. Right-click the security group, click **Properties**, and then click the **Security tab**.
6. In the Group or user names list, click the user account of the user who is installing Microsoft Dynamics CRM if the account is listed. If the account is not listed, click Add to add the user account.
7. In the Allow column, click to select the check box for the **Create All Child Objects** permission.

Note By default, the Allow check box is selected for the Read permission.

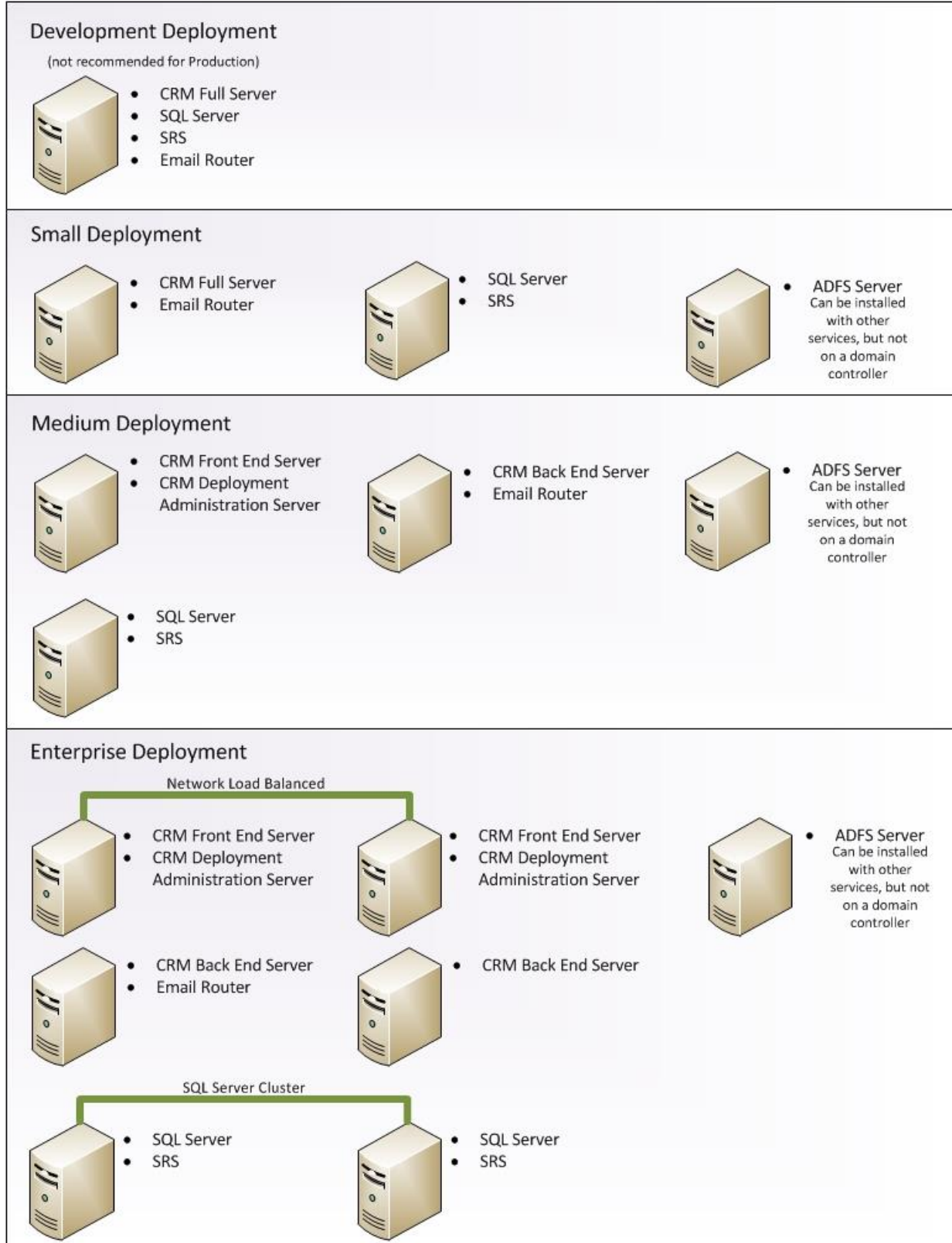
8. Click Advanced.
9. In the Permission entries list, click Add, select the user account of the user who is installing Microsoft Dynamics CRM, and then click OK.



10. In the Apply onto list, click This object and all descendant objects.
11. In the Allow column, click to select the following check boxes:
  - a. Read Permissions
  - b. Modify Permissions
  - c. Create All Child Objects
12. Click OK to accept the changes and close Active Directory.



## Microsoft Dynamics CRM Deployment Topologies



Very Small Deployment model is not recommended for production environments.

PowerObjects delivers Deployment Administration Server to Front End Servers unless otherwise requested.

In addition to being able to distribute processing by installing CRM server roles on different servers, the solution also allows for each individual service within the server role to run on different servers. Discuss the ideal deployment scenario with your project’s technical resource for more information.

## How to add a Deployment Administrator to your CRM Deployment

1. Log into the server running CRM Deployment Tools. In Full Server deployments this is the CRM Server, in multi-server deployments it should be your CRM Front End or web server.
2. From the Programs menu Launch Microsoft Dynamics CRM Deployment Manager from the Microsoft Dynamics CRM group.
3. Expand the tree and click “Deployment Administrators”.
4. Right click and choose New Deployment Administrator.
5. Enter the domain user name for the new Deployment Administrator. Accept the selection.
6. Add the user to the local administrators group on the CRM Server.
7. Add the user to the local administrators group on the SQL Server for the deployment.
8. Grant the user sysadmin privilege in SQL Server, ensure the user has dbowner rights on all organization databases and the MSCRM\_CONFIG database.
9. Add the user to the Active Directory Group ReptGroup

## How to Add a CRM User and Assign the System Administrator Role

1. Log into CRM with a user account that has the roles necessary for creating users.
2. Browse to Settings, Administration, Users
3. Click New User
4. In the User Name field provide the domain and user name DOMAIN\userid
5. Click tab. The remaining required fields like First and Last name should have populated from Active Directory.
6. Click Save button.
7. Click Manage Roles, scroll to System Administrator and check the role.
8. Save the user record.

## Microsoft Dynamics CRM 2011 Supported Browsers

Platform	Internet Explorer	Firefox	Chrome	Safari
Windows XP	Version 7 and 8	Latest version	Latest version	Not supported
Windows Vista	Version 7, 8, and 9	Latest version	Latest version	Not supported
Windows 7	Version 8, 9, 10, and 11	Latest version	Latest version	Not supported
Windows 8	Version 10 for the desktop	Latest version	Latest version	Not supported
Windows 8.1	Version 11	Latest version	Latest version	Not supported



Platform	Internet Explorer	Firefox	Chrome	Safari
Apple OS X 10.7 (Lion)	Not supported	Not supported	Not supported	Latest version
Apple OS X 10.8 (Mountain Lion)	Not supported	Not supported	Not supported	Latest version

### Microsoft Dynamics CRM 2013 Supported Browsers

Platform	Internet Explorer	Firefox	Chrome	Safari
Windows Vista	Version 8 and 9	Latest version	Latest version	Not supported
Windows 7	Version 8, 9, 10, and 11	Latest version	Latest version	Not supported
Windows 8	Version 10 for the desktop	Latest version	Latest version	Not supported
Windows 8.1	Version 11	Latest version	Latest version	Not supported
Apple OS X 10.7 (Lion)	Not supported	Not supported	Not supported	Latest version
Apple OS X 10.8 (Mountain Lion)	Not supported	Not supported	Not supported	Latest version

### Microsoft Dynamics CRM 2015 Supported Browsers

Platform	Internet Explorer	Firefox	Chrome	Safari
Windows 7	Version 10 and 11	Latest version	Latest version	Not supported
Windows 8	Version 10 for the desktop	Latest version	Latest version	Not supported
Windows 8.1	Version 11	Latest version	Latest version	Not supported
Apple OS X 10.7 (Lion)	Not supported	Not supported	Not supported	Latest version
Apple OS X 10.8 (Mountain Lion)	Not supported	Not supported	Not supported	Latest version

### Microsoft Dynamics CRM 2016 and CRM 365 Supported Browsers

Platform	Internet Explorer	Microsoft Edge	Firefox	Chrome	Safari
Windows 7	Version 11	Not supported	Latest version	Latest version	Not supported



Platform	Internet Explorer	Microsoft Edge	Firefox	Chrome	Safari
Windows 8	Version 10 classic CRM interface only	Not supported	Latest version	Latest version	Not supported
Windows 8.1	Version 11	Not supported	Latest version	Latest version	Not supported
Windows 10	Version 11	Supported	Latest version	Latest version	Not supported
Apple OS X 10.7 (Lion)	Not supported	Not supported	Not supported	Not supported	Latest version
Apple OS X 10.8 (Mountain Lion)	Not supported	Not supported	Not supported	Latest version	Latest version

### Microsoft Dynamics CRM 2011 for Outlook Requirements

Component	Minimum	Recommended
Processor	x86- or x64-bit 1.5 GHz processor	Multi-core 2-GHz processor or higher
Memory	2-GB RAM	4-GB RAM or more
Hard disk	1.5 GB of available disk space	2 GB of available disk space 7200 RPM or more
Network	Bandwidth greater than 50 Kbps Latency under 175 ms Successful network installation of CRM for Outlook requires a reliable and high-throughput network. Otherwise, installation might fail. The recommended minimum available bandwidth of the network connection is 300 Kbps.	
Operating System	Windows 8 Windows 7 (both 64-bit and 32-bit versions) Windows Vista SP2 (both 64-bit and 32-bit versions) Windows XP Professional SP3 Windows XP Tablet SP3 Windows XP Professional x64 Edition Windows Server 2008 or Windows Server 2003 when running with Remote Desktop Services (formerly Terminal Services) Note: Windows XP Media Center is not supported.	
Microsoft Office	Microsoft Office 2003 SP3 2007 Microsoft Office system SP2 Microsoft Office 2010	
Internet Explorer	Internet Explorer 9 Internet Explorer 8 Internet Explorer 7	





## Microsoft Dynamics CRM 2013 for Outlook Requirements

Component	Minimum	Recommended
Processor	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set
Memory	2-GB RAM	4-GB RAM or more
Hard disk	1.5 GB of available disk space	2 GB of available disk space 7200 RPM or more
Network	Bandwidth greater than 50 Kbps Latency under 150 ms Successful network installation of CRM for Outlook requires a reliable and high-throughput network. Otherwise, installation might fail. The recommended minimum available bandwidth of the network connection is 300 Kbps.	
Operating System	Windows 8.1 or Windows 8 (64-bit and 32-bit versions) Windows 7 (64-bit and 32-bit versions) Windows Vista SP2 (64-bit and 32-bit versions) Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application Note: Windows XP is not supported; Windows Server 2003 is not supported.	
Microsoft Office	Microsoft Office 2013 (64 or 32-bit) Microsoft Office 2010 (64 or 32-bit) Microsoft Office 2007 (32-bit)	
Internet Explorer	Internet Explorer 10 Internet Explorer 9 Internet Explorer 8	

## Microsoft Dynamics CRM 2015 for Outlook Requirements

Component	Minimum	Recommended
Processor	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set
Memory	2-GB RAM	4-GB RAM or more
Hard disk	1.5 GB of available disk space	2 GB of available disk space 7200 RPM or more
Network	Bandwidth greater than 50 Kbps Latency under 150 ms Successful network installation of CRM for Outlook requires a reliable and high-throughput network. Otherwise, installation might fail. The recommended minimum available bandwidth of the network connection is 300 Kbps.	



Component	Minimum	Recommended
Operating System	Windows 10 (64-bit and 32-bit versions) Windows 8.1 or Windows 8 (64-bit and 32-bit versions) Windows 7 Service Pack 1 (64-bit and 32-bit versions) Windows Server 2012 when running as a Remote Desktop Services application Note: Windows Vista is not supported; Windows Server 2008 is not supported.	
Microsoft Office	Office 365 Microsoft Office 2016 (64 or 32-bit) Microsoft Office 2013 (64 or 32-bit) Microsoft Office 2010 (64 or 32-bit) Note: Support for Office 2007 is dropped with CRM 2015	
Internet Explorer	Internet Explorer 10 Internet Explorer 11	

## Microsoft Dynamics CRM 2016 and Dynamics 365 for Outlook Requirements

Component	Minimum	Recommended
Processor	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set
Memory	2-GB RAM	4-GB RAM or more
Hard disk	1.5 GB of available disk space	2 GB of available disk space 7200 RPM or more
Network	Bandwidth greater than 50 Kbps Latency under 150 ms Successful network installation of CRM for Outlook requires a reliable and high-throughput network. Otherwise, installation might fail. The recommended minimum available bandwidth of the network connection is 300 Kbps.	
Operating System	Windows 10 (64-bit and 32-bit versions) Windows 8.1 or Windows 8 (64-bit and 32-bit versions) Windows 7 Service Pack 1 (64-bit and 32-bit versions) Windows Server 2012 when running as a Remote Desktop Services application Note: Windows Vista is not supported; Windows Server 2008 is not supported.	
Microsoft Office	Office 365 Microsoft Office 2016 (64 or 32-bit) Microsoft Office 2013 (64 or 32-bit) Microsoft Office 2010 (64 or 32-bit) Note: Support for Office 2007 is dropped with CRM 2015	
Internet Explorer	Internet Explorer 10 Internet Explorer 11	



## Recommended Settings for Microsoft Dynamics CRM Users

The following settings are recommended for all users of CRM. Since the CRM Client for Outlook relies upon Internet Explorer, the Internet Explorer recommendations apply to CRM Client for Outlook users as well. These settings can be deployed to users via Group Policy.

Increase simultaneous download sessions:

The CRM application synchronously requests data to and from the CRM data center. In many cases, you can easily exhaust the number of simultaneous downloads when using CRM. To increase this limit, review KB article 282402: <http://support.microsoft.com/kb/282402>

Add appropriate URLs to Local Intranet Sites:

Internet Explorer Security tab is used to set and change options that can help protect your computer from potentially harmful or malicious online content. By placing the URLs used for CRM into the Intranet, it places fewer restrictions for these web sites. To accomplish:

1. Open Internet Explorer
2. Go to Tools > Internet Options
3. Click the Security tab
4. Click Intranet Sites > Sites
5. Click Advanced
6. Add a record that covers your entire domain such as [https://\\*.yourdomain.com](https://*.yourdomain.com)

Note: If you get a pop-up window that states "Sites added to this zone must use the https:// prefix. This prefix assures a secure connection.", uncheck the box for "Require server verification (https:) for all sites in this zone"

Increase Disk Space Size for Temporary Internet Files:

To ensure internet files for CRM are not being deleted, increase your Temporary Internet Files disk space. To accomplish:

1. Open Internet Explorer
2. Navigate to Tools and then click Internet Options
3. Under the General tab in the Browsing history section click on Settings
4. Update the field "Disk space to use" to 350 Note: Default is 50
5. Click OK and then click OK again

Leave the "Delete browsing history on exit" option unchecked:

If you enable this option, all of your browsing history is deleted when you close Internet Explorer. It deletes everything marked within your Browsing History Settings button. To optimize your CRM experience, we recommend you leave this box unchecked.

By default, Temporary Internet files, Cookies, and History are enabled. Deleting your Temporary Internet files will cause IE to cache the files again, and deleting the Cookies will cause you to be signed out of CRM. To prevent:

1. Open up Internet Explorer
2. Go to Tools and then click Internet Options
3. Under the General tab locate the Browsing history section
4. Ensure the check box "Delete browsing history on exit" is unchecked.

Add Microsoft Dynamics CRM URLs to allow pop-ups:

CRM occasionally uses pop-up windows, and these pop-up windows can be blocked by the Internet Explorer Pop-up Blocker. You must configure the Pop-up Blocker to allow the CRM URLs to be excluded from the Pop-up Blocker. To allow CRM to be excluded from the Internet Explorer Pop-up Blocker, go through the following.

1. Open Internet Explorer



2. Click Tools, click Pop-up Blocker, click Pop-up Blocker Settings

Note: In Internet Explorer 9 this option can be found by clicking the Tools menu, clicking Internet Options, clicking the Privacy tab, and then clicking the Settings button within the Pop-Up Blocker section

3. Add a record that covers your entire domain such as: \*.yourdomain.com, or your CRM URL.
4. Click Close

Compatibility Mode for Microsoft Dynamics CRM 2011 and Internet Explorer 10:

Add your CRM site to the list of sites displayed in Compatibility Mode. To accomplish:

1. Open Internet Explorer
2. Click Tools, click Compatibility View Settings
3. Add a record that covers your entire domain such as: \*.yourdomain.com, or your CRM URL.

“WhiteList” your CRM URL to prevent them from being scanned by Internet Protection Software:

Many organizations deploy Internet Protection Suites to scan websites for viruses or malware. Please refer to your product documentation to exclude your CRM site from the websites to be scanned.

## Installing and Configuring the CRM Client for Outlook

This section describes how to deploy the CRM Client for Outlook. Microsoft supports delivering this application via the software delivery tool of your choice.

Visit the Microsoft Download Center to download the Outlook client for your CRM version

CRM 2011 <http://www.microsoft.com/en-us/download/details.aspx?id=27821>

CRM 2013 <http://www.microsoft.com/en-us/download/details.aspx?id=40344>

CRM 2015 <http://www.microsoft.com/en-us/download/details.aspx?id=45015>

CRM 2016 <http://www.microsoft.com/en-US/download/details.aspx?id=50370>

Dynamics 365 v9 <https://www.microsoft.com/en-us/download/details.aspx?id=56972>

Tip: If the above link is no longer working, search the Download Center for “CRM 2011 Outlook”, “CRM 2013 Outlook” or “CRM 2015 Outlook” to locate the new location.

Download the appropriate client version, noting that the use of the 32 bit or 64 bit client should match the installation of Microsoft Office, and not the local Operating System.

Tip: Unsure of which version of Office you’re running? Click the File tab in an Office application and click the Help section. Your product version will be listed on the right.

## Choose the download you want

<input checked="" type="checkbox"/> File Name	Size
<input checked="" type="checkbox"/> CRM2013-Client-ENU-amd64.exe	156.0 MB
<input checked="" type="checkbox"/> CRM2013-Client-ENU-i386.exe	153.3 MB



Close Microsoft Office Outlook during the duration of the install and configuration.

Begin the installation by running the file that was downloaded in step 2. Users will be prompted for a location to store the decompressed installation files.

Click the Install button to begin a standard installation, or click Options to include the installation for Offline Capability.

Note: Offline capability is managed by your CRM administration and may not be permitted in all environments.

When the installation has completed, start Microsoft Office Outlook to begin the Configuration Wizard. In the Server URL field, enter the URL for your CRM organization, using https:// if your deployment uses it.

Click Test Connection and enter your CRM credentials when prompted.

Tip: Check “Remember my password and connect me automatically” to have your credentials stored.

Microsoft Dynamics CRM for Outlook

### Configure Organization

Enter the information for the Microsoft Dynamics CRM server.

**Server Information**

Server URL:  CRM Online

Authenticated as:

**Organization Information**

Organization:

Display Name:

Synchronize with this Organization

After the credentials are verified, select your CRM organization from the drop down list in Organization Information.

If this is your primary CRM organization, leave “Synchronize with this Organization” checked to enable record creation between CRM and Outlook via synchronization filters.

Click OK to begin initialization. When the initialization is complete you will be ready to use the Outlook client for CRM, however it is best to proceed directly to installing the most recent Update Rollup for CRM.

Check Microsoft Download Center to locate the most current Update Rollup for CRM by searching for “CRM <version> Update Rollup”. Within the list of files, the file for the Outlook client will have “client” in

the file name and also include the 32 bit or 64 bit versions. Download the correct file for your installation.

Be sure to close Microsoft Office Outlook before beginning the installation of the Update Rollup. You may restart Outlook once the installation of the rollup has completed.

The Configuration Utility and diagnostics utilities are available in the Programs menu.

## Post Implementation Maintenance and Support

### Update Rollups, Patches and Service Updates

Microsoft regularly releases patches for both the CRM server as well as the CRM client applications. These updates can be delivered via Windows Update. PowerObjects recommends that clients manage the deployment of CRM updates to servers *and* to clients, and decide as an organization which updates will be applied and when. PowerObjects does internal testing for each update that comes out and will be happy to share our results and recommendation with you via a support inquiry.

Server side updates often require a brief downtime for server reboots and should be applied during a period of low or little activity.

While it is not technically required, we recommend that client applications match the version that is running on the servers. This often gives the best result.

Please refer to the PowerObjects CRM Book for further information on managing updates to CRM.

<http://crmbook.powerobjects.com/system-administration/updates-and-rollups/>

### SQL Server Maintenance Plans and Backups

Please add the MSCRM\_CONFIG database and any database ending in \_MSCRM to your database backup routine. Recent, full backups of these databases will be key to recovering your deployment in the event of a catastrophe.

PowerObjects recommends the following SQL Maintenance Plans:

Weekday ReOrg and Update Stats:

Step 1: Reorganize Index Task. Reorganize index on Local Server Connection, all databases\*.

Step 2: Update Statistics Task. Update Statistics on Local Server Connection, all databases\*.

Schedule: Monday – Friday at an off peak hour, such as 1:00 am.

Weekend Cleanup, Rebuild Index and Update Stats:

Step 1: History Cleanup Task. Cleanup history on Local Server Connection, type backup, job, maintenance plan, records older than 2 weeks.

Step 2: Rebuild Index Task. Rebuild index on Local Server Connection, all databases\*.

Step 3: Update Statistics Task. Update Statistics on Local Server Connection, all databases\*.

Schedule: Sunday at an off peak hour, such as 1:00 am.

\*In the event non-CRM databases having their own maintenance plans are running on the server, you may select the MSCRM\_CONFIG database, any database ending in \_MSCRM, and the System Databases.

### Support

PowerObjects offers a full range of support options to assist you in keeping your CRM deployment running in tip top condition. Our support group can be reached in the following ways:

**PowerCare Portal:** <https://powercare.powerobjects.net> Authentication Required. Work with your PowerObjects Account Rep to obtain access.

**Email Requests:** [crmsupport@powerobjects.com](mailto:crmsupport@powerobjects.com)

**Phone Requests:** (612) 334-3355, ask for the support team.





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## Self-Support

PowerObjects contributes a variety of resources to the CRM Community:

**CRM How-To Portal:** <http://crmhowto.powerobjects.com/> Wealth of training videos, webinars, white papers, and articles to assist you in managing your deployment. Authentication required, offered only to PowerObjects clients. Work with your PowerObjects Account Rep to obtain access.

**PowerObjects Blog:** <http://www.powerobjects.com/blog/>

**The CRM Book:** <http://crmbook.powerobjects.com> Collaboratively authored by PowerObjects staff, this online resource is updated regularly, covering a range of topics.

## Conclusion

We've attempted to make this an exhaustive guide covering the questions most frequently asked by our clients during implementations. If additional information is required, please reach out to your PowerObjects Project Manager for more information. Thank you.

