Microsoft

Microsoft Dynamics CRM Resource Guide 2015

Here for you.

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

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

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

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Self-Service Support Resources

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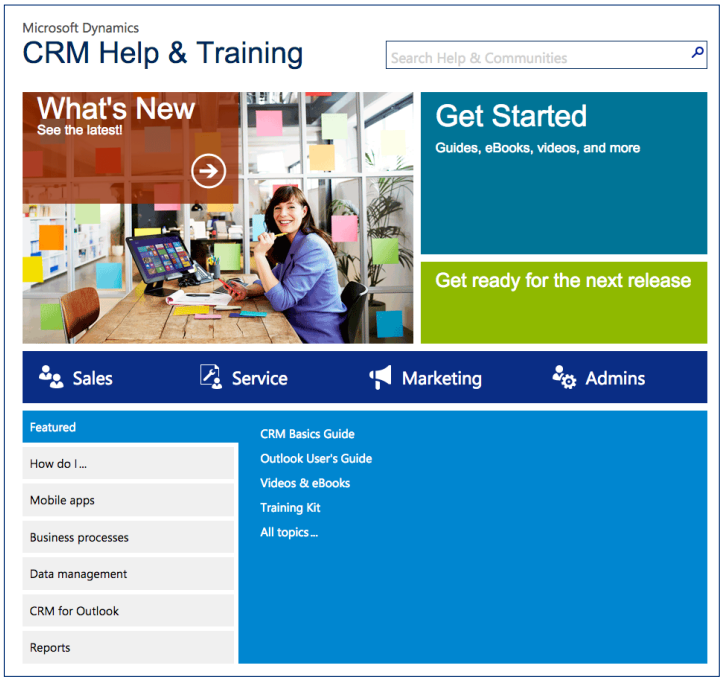
Microsoft's self-service resources are available 24x7 for times when you need just a little extra help or guidance.

Help & Training



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

The Microsoft Dynamics Help & Training is your place to:

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

Microsoft

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

Customer Service Quick Reference Card

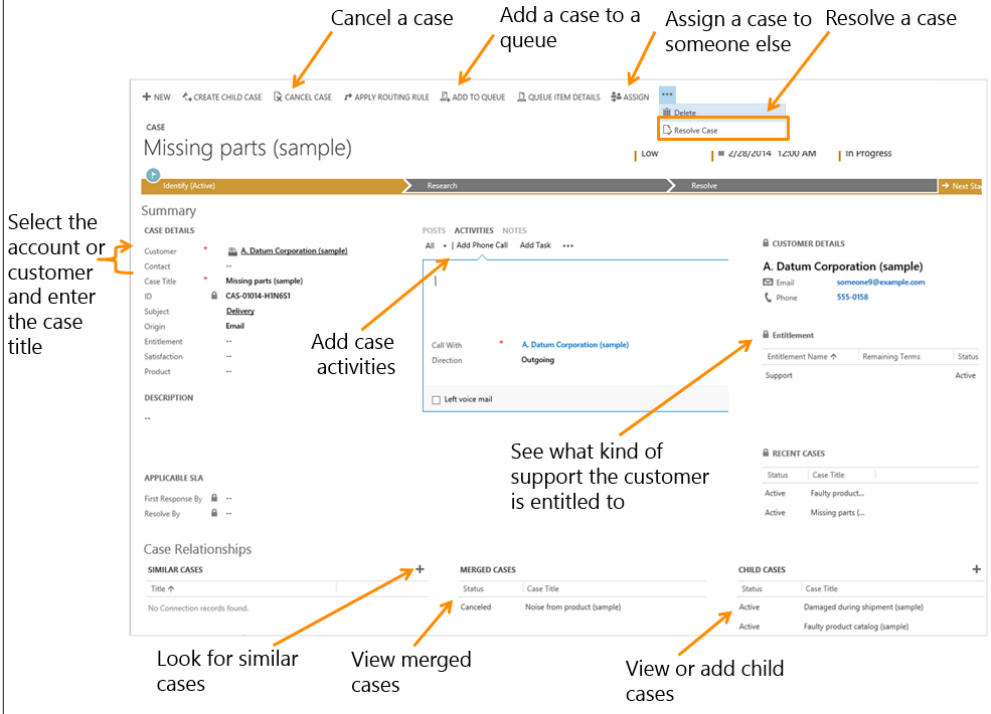
Create, edit and resolve service cases. Get the quickref card.

Microsoft Dynamics CRM Quick Reference for a Customer Care Representative

Create a new case

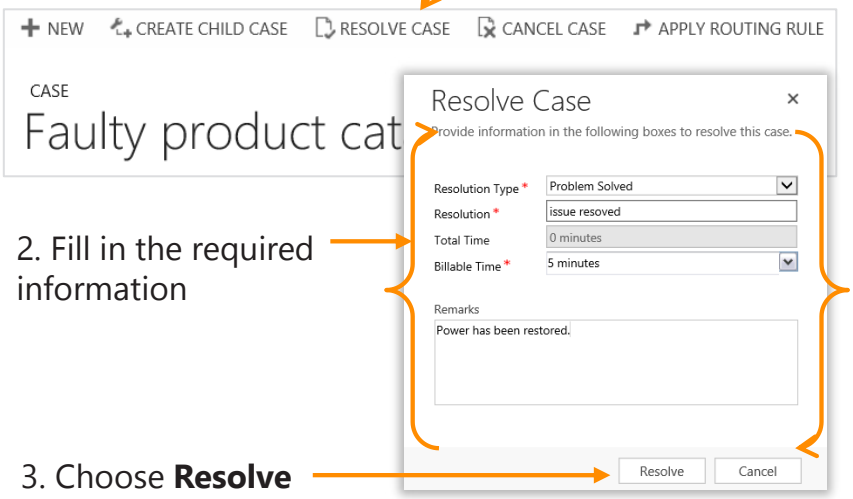
A customer care representative can easily create and manage cases using Microsoft Dynamics CRM.

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



Resolve a case

1. Choose **RESOLVE CASE**



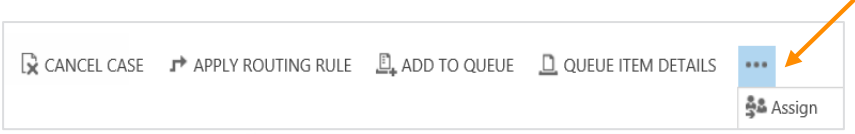
2. Fill in the required information

3. Choose **Resolve**

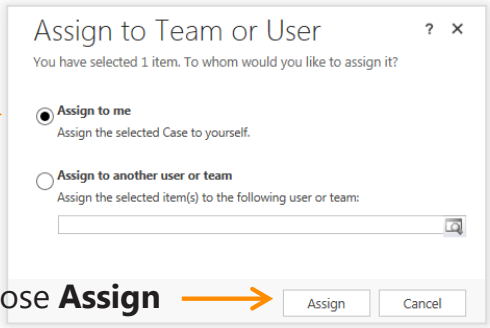
Assign a case to someone else

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

1. Choose **Assign**.



2. Select who you want to assign the case to



3. Choose **Assign**

eBooks

Check out these short, user friendly, visual guides to key areas, including CRM basics, what's changed in CRM 2015, business processes, and more. Go to CRM eBooks

CRM Videos

In two minutes or less, watch short videos to get started with service, mobile, and online license management, and to learn about the new navigation in Dynamics CRM 2015. Find more videos on the Microsoft Dynamics CRM channel on YouTube.

Implementation & Administration

CRM Online Onboarding Success – **Step by step guidance** for customers to onboard their organization and users on CRM Online and includes new Tools such as a Licensing calculator to help determine the right requirement of CRM licenses, instances, and storage and a Deployment planning guide to enable proactive planning.

Deploying and Administering CRM Online and CRM 2015 (on-premises) – Get detailed info to install, configure, customize, and maintain Dynamics CRM 2015. For IT pros and CRM admins.

CRM Training and Adoption Kit – Download editable eBooks that you can customize any way you like. Feel free to leverage some of our Dynamics CRM 2015 content for your training and readiness needs.

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

After you update to CRM 2015 – next steps web page – Quickly access links to info about important steps to take to get the most out of the new features and tools.

CRM Setup & Administration – Go to www.CRMITProCenter.com for help to deploy and administer Microsoft Dynamics CRM.

Customization & Development

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

CRM 2015 Microsoft Dynamics CRM SDK – View the Software Development Kit (SDK) online, or download all the SDK docs in the MSDN library, plus hundreds of code samples in C# and Visual Basic .NET, tools to register plug-ins, and a design guide for solutions.

CRM 2015 Logical Entity Diagrams- Check out these Visio diagrams that show Dynamics CRM 2015 entity relationships.

Microsoft

Assisted Support Resources

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

Our Commitment to You

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

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

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

Tiered support plans are available for every business type.

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

Microsoft

Assisted care whenever you need it.

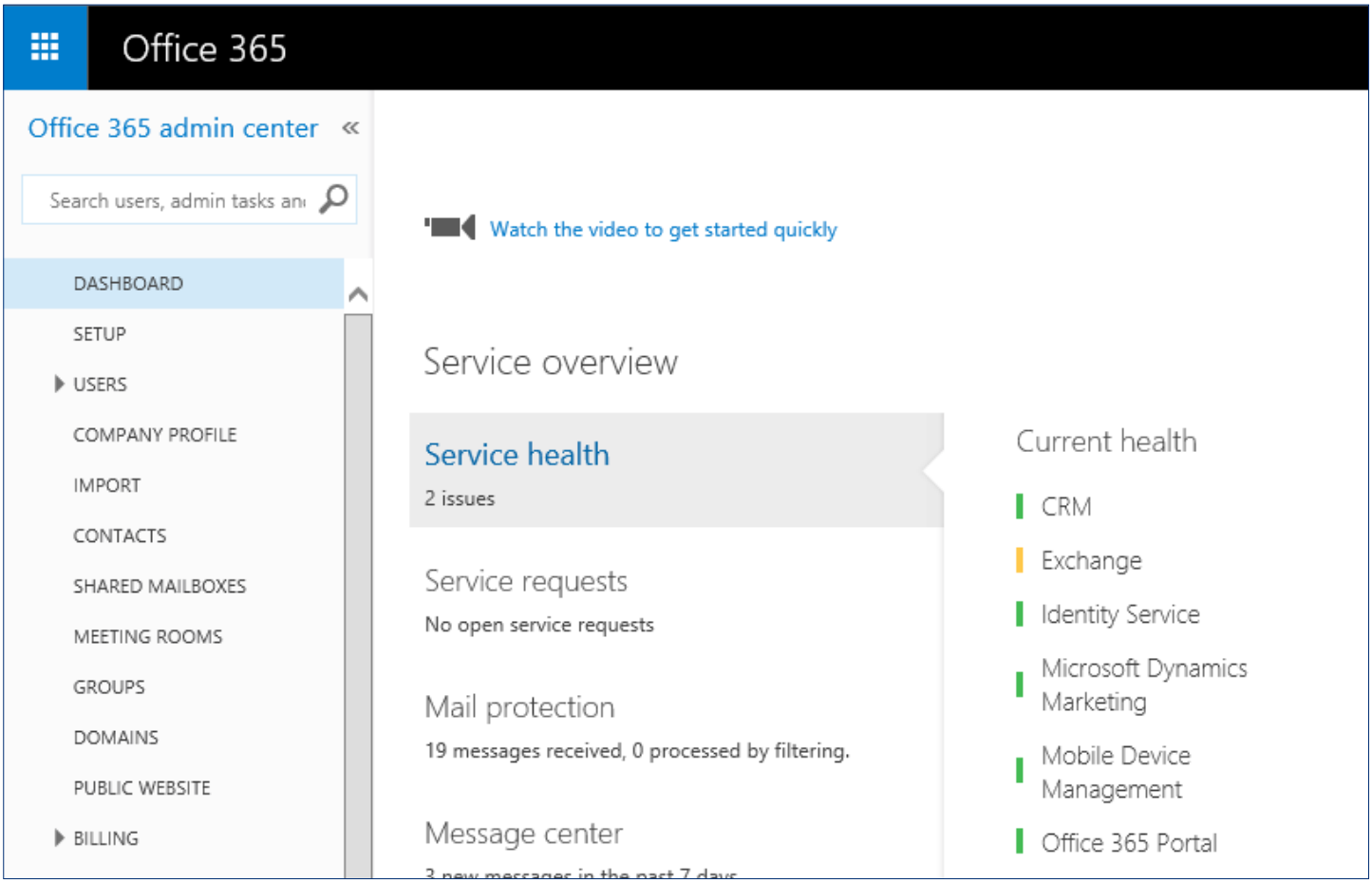
Contact a technical support specialist for CRM Online

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

  Online (recommended - see the process below) – https://portal.office.com

  Phone – **1-800-865-9408** (North America) or other countries/regions
- Before submitting a support case make sure to check the Service Health Dashboard for known issues.
- You may also try our self-help /troubleshooting

Note: Your screen view experience may vary



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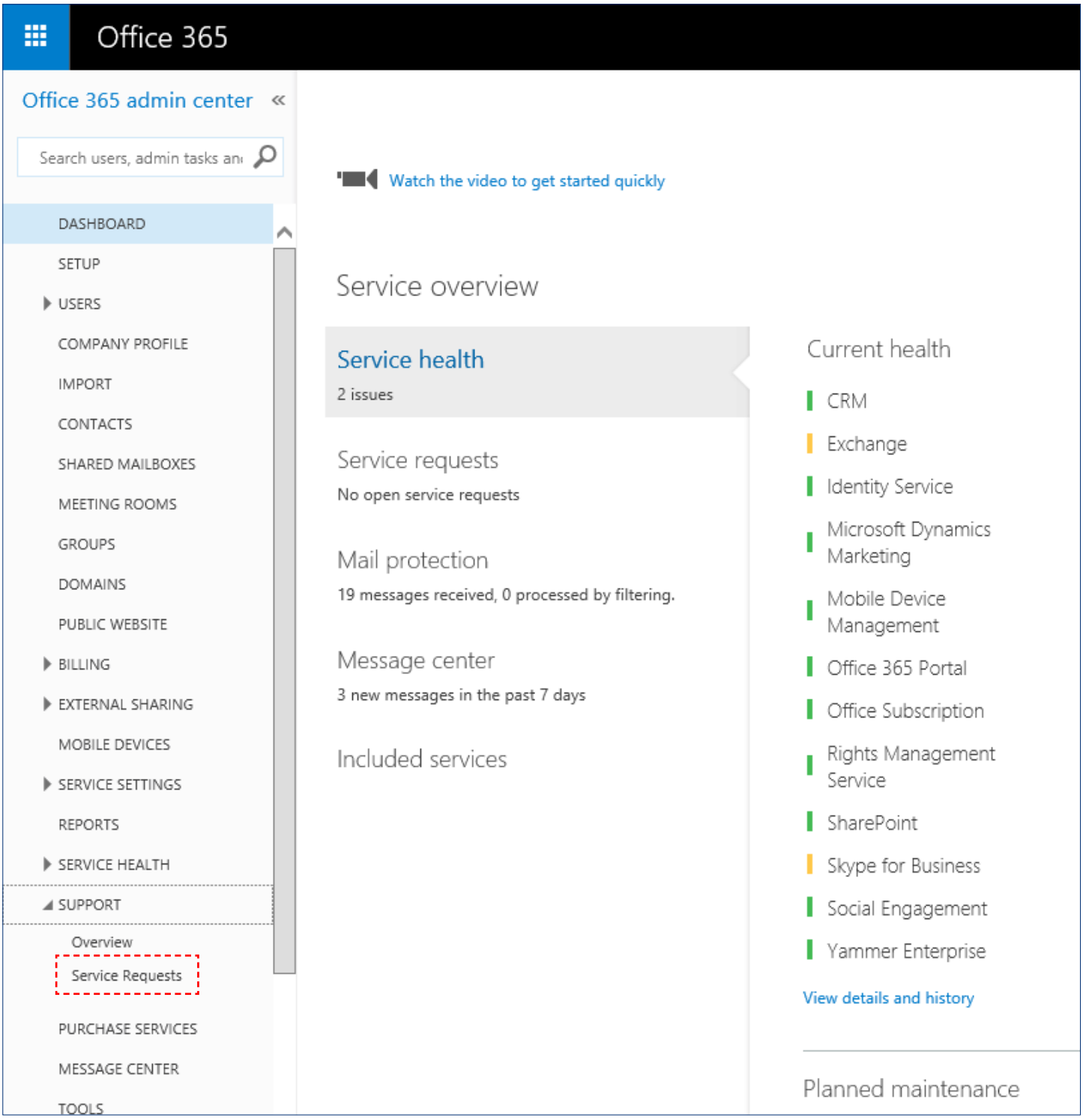
Select Support > Service Requests



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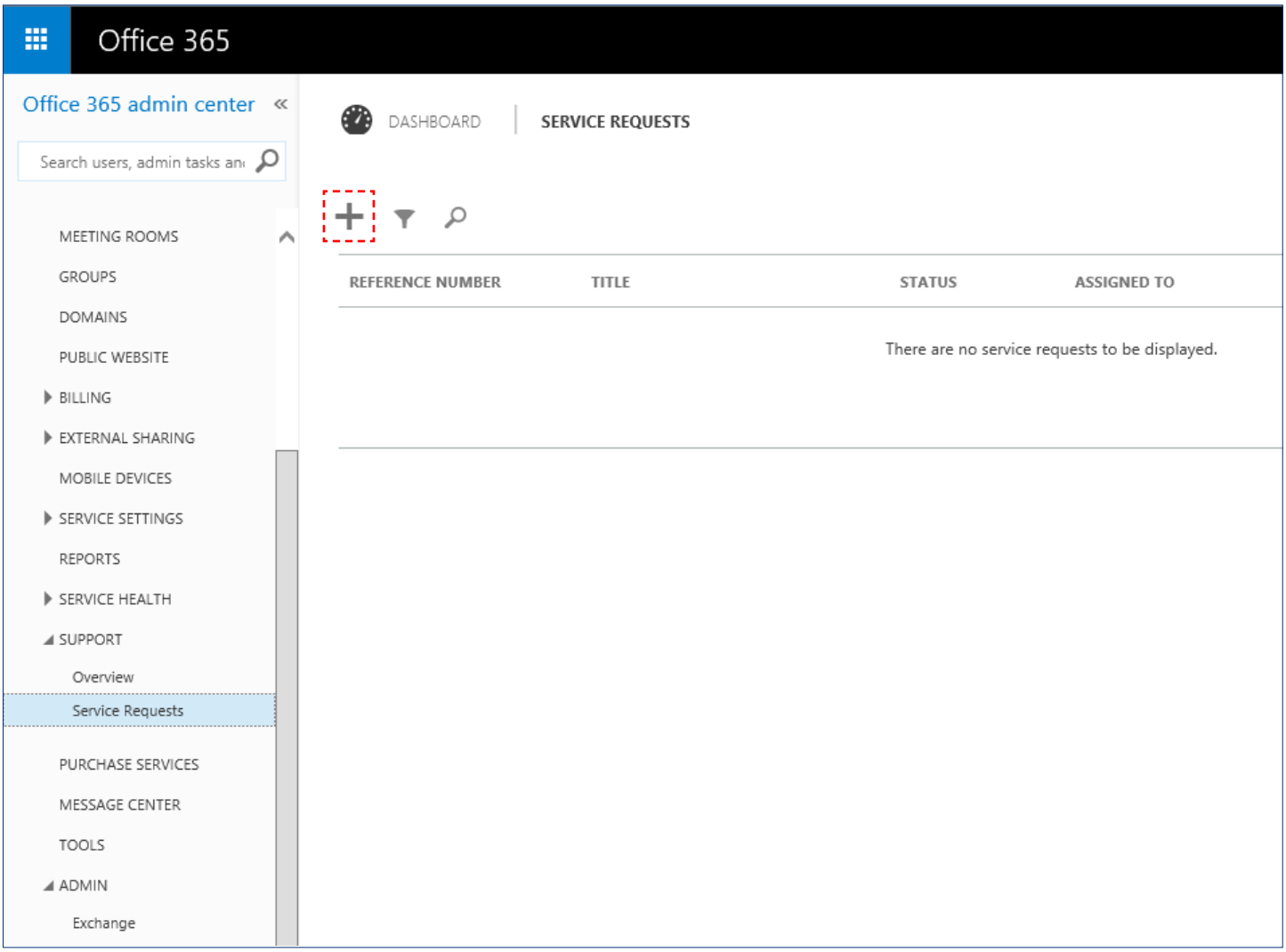
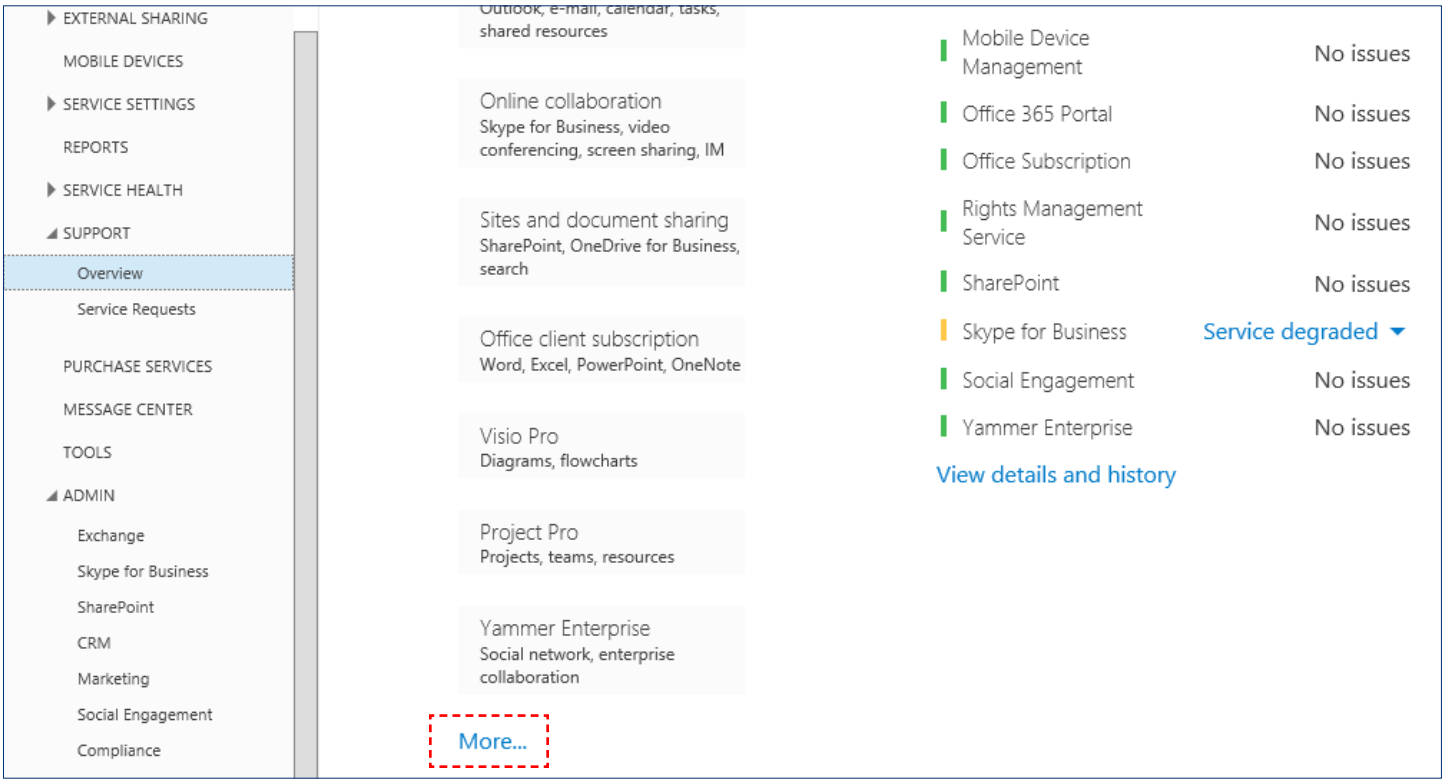
Click the plus button

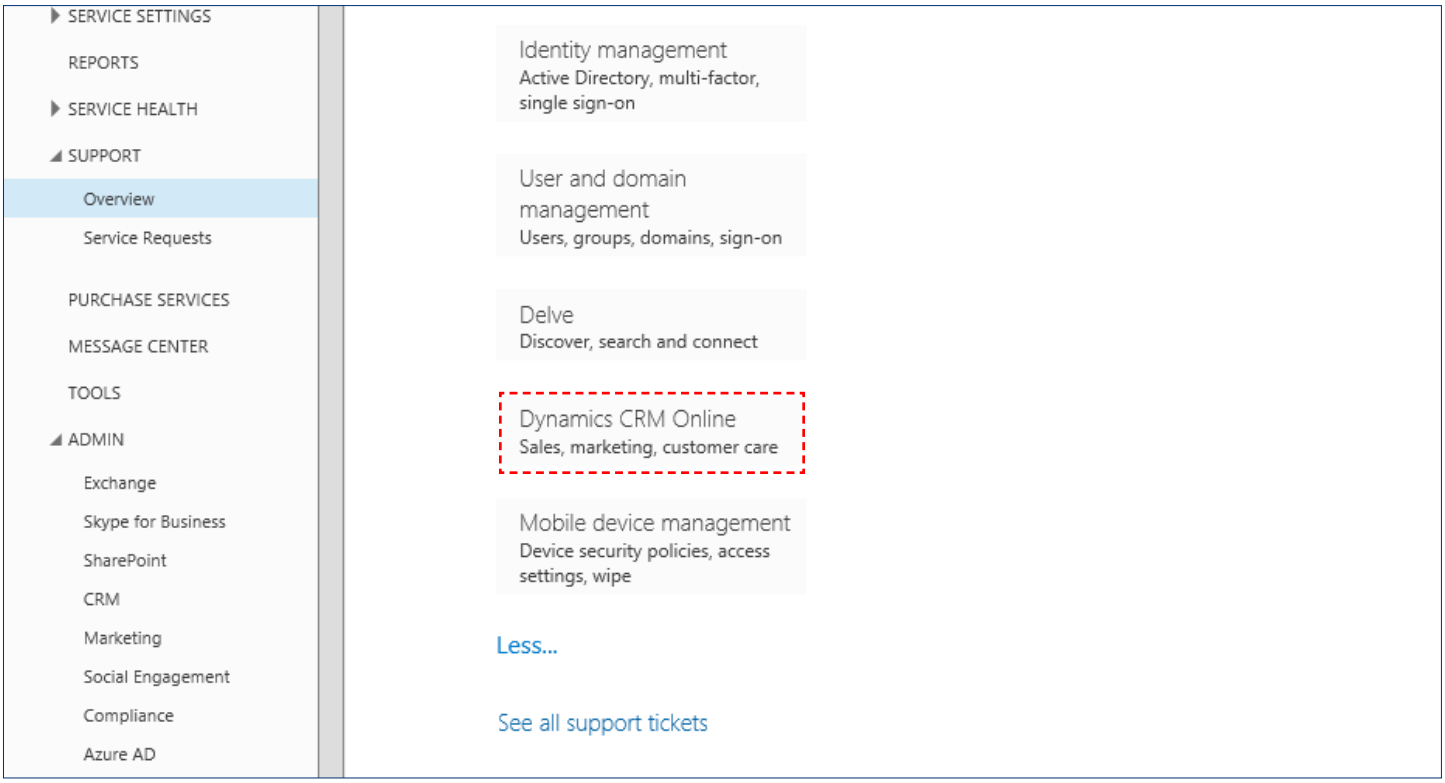


Microsoft

Select More > Service Requests



Select Dynamics CRM Online



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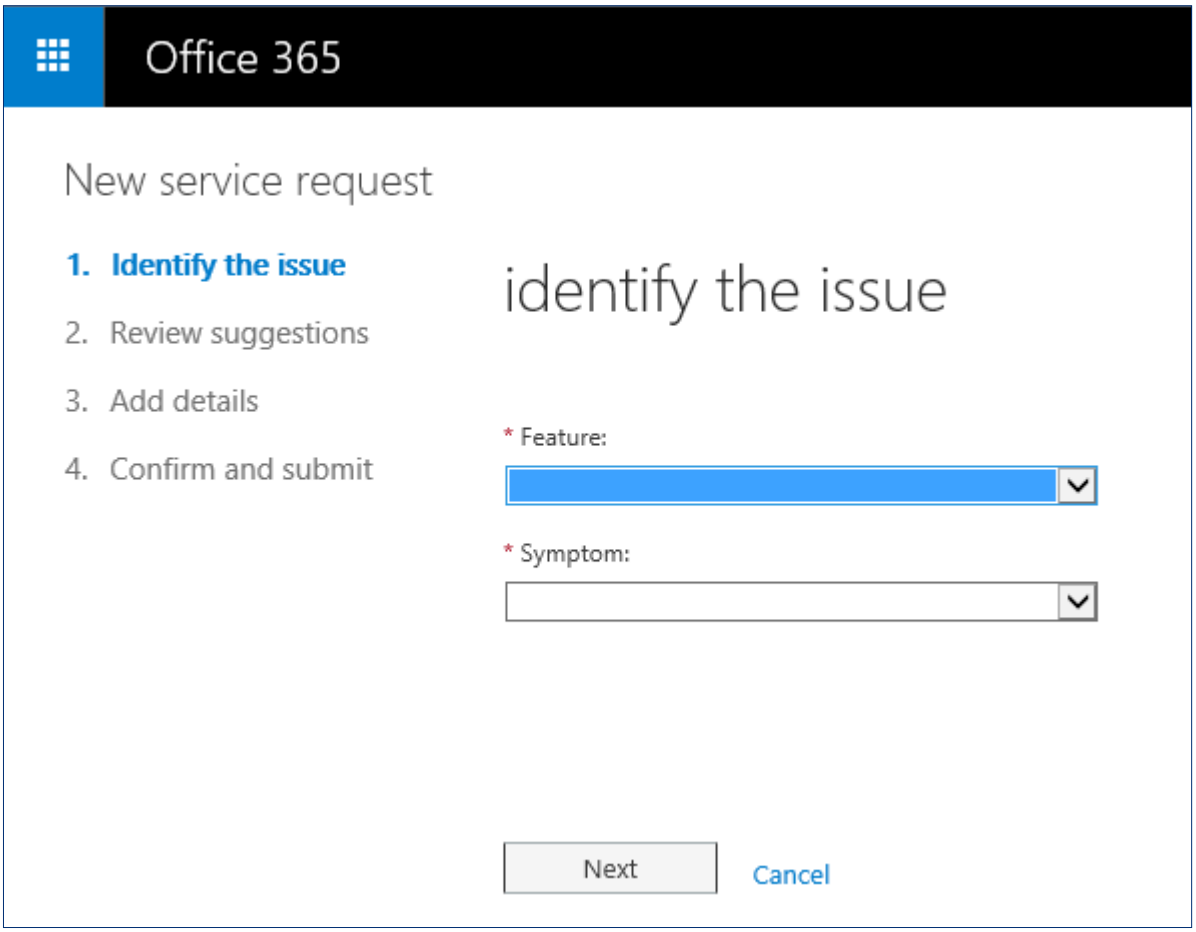
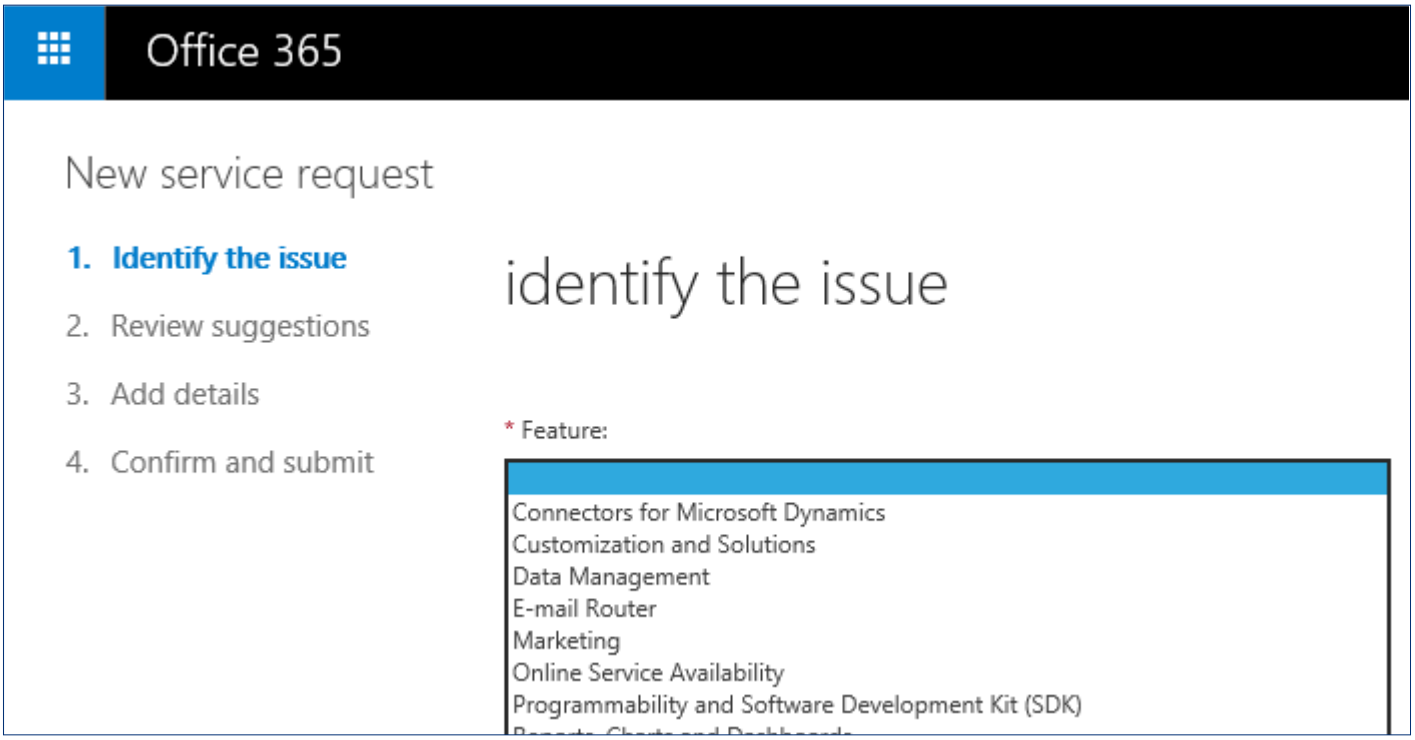
Complete form





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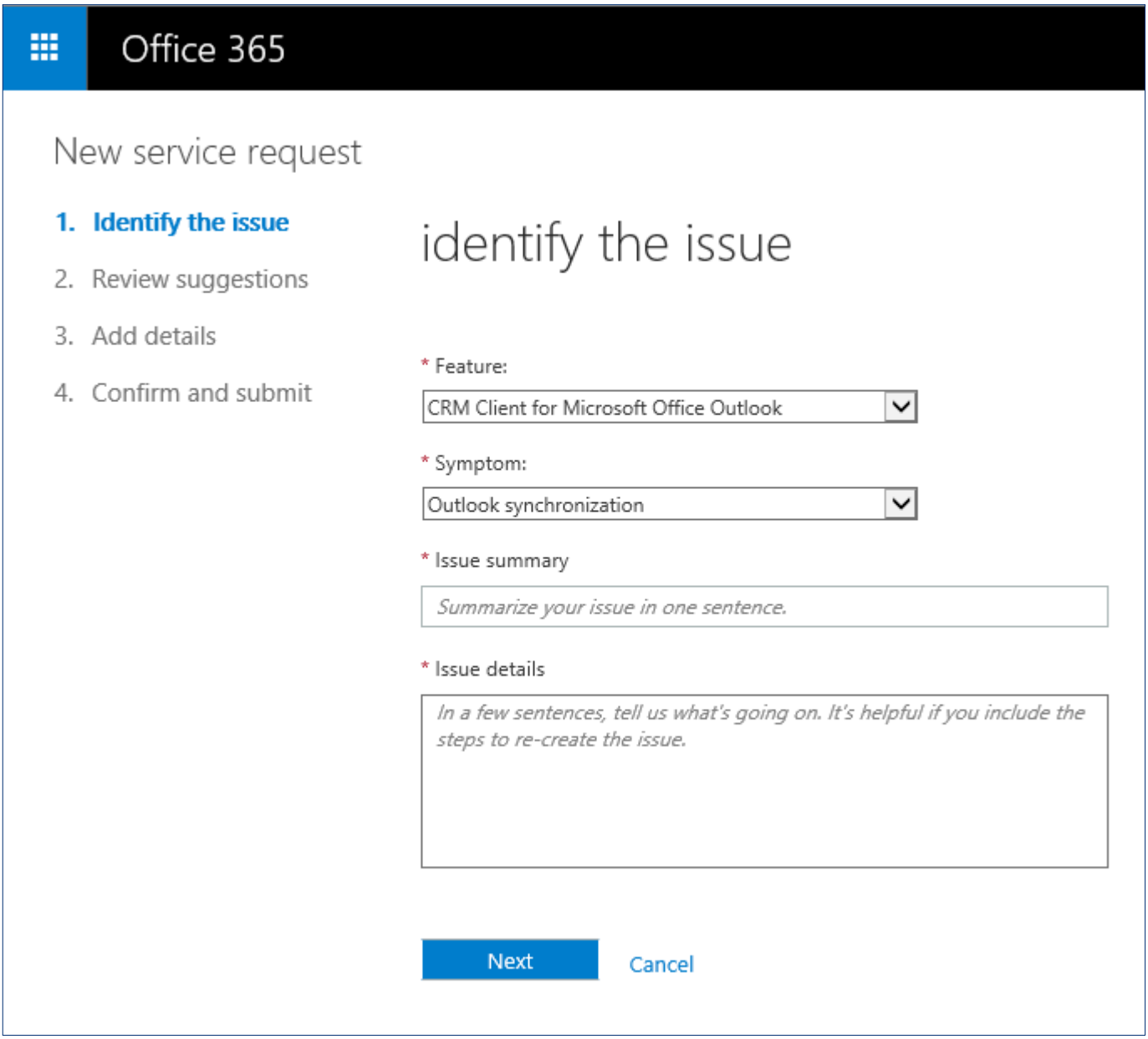
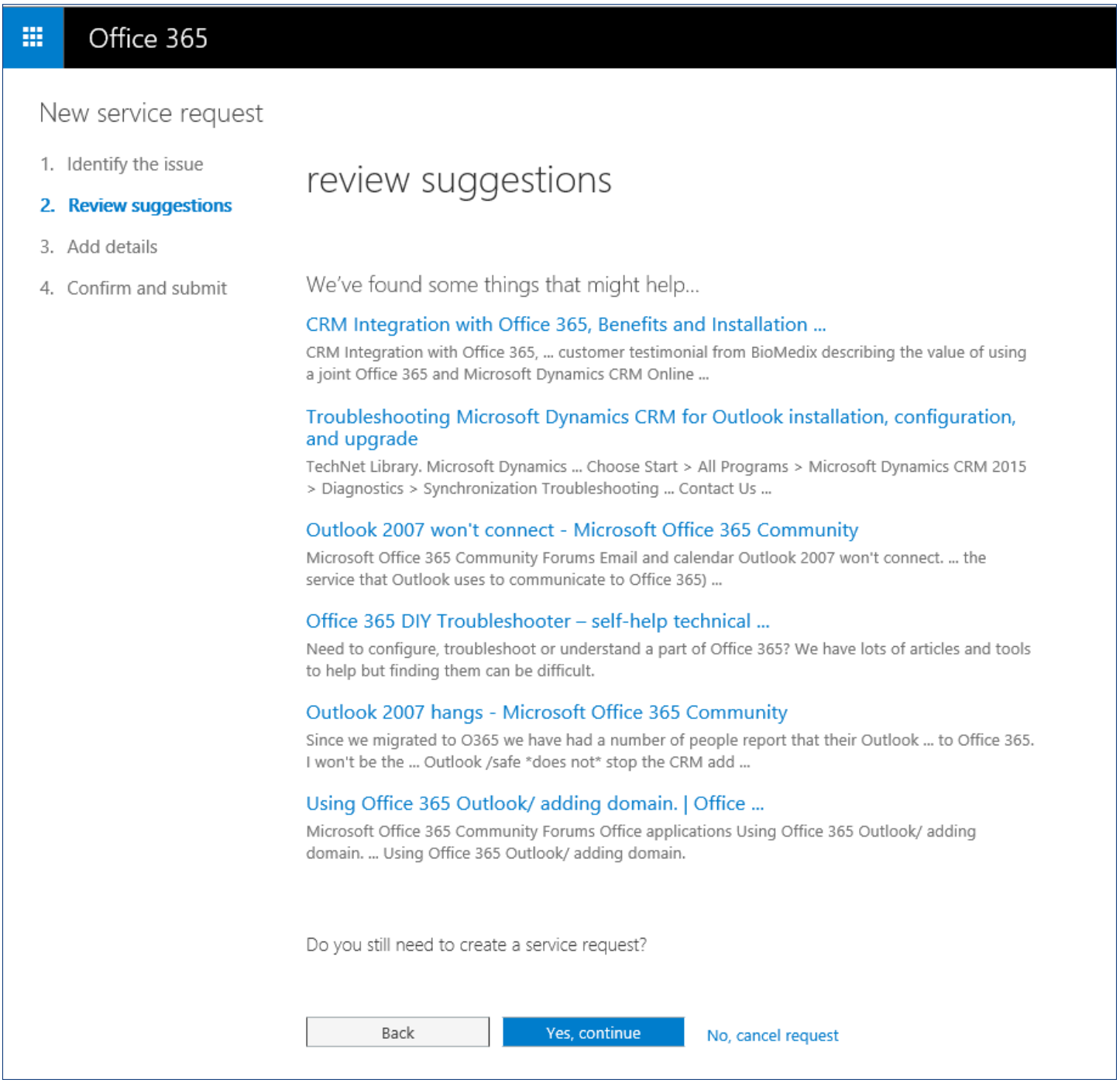
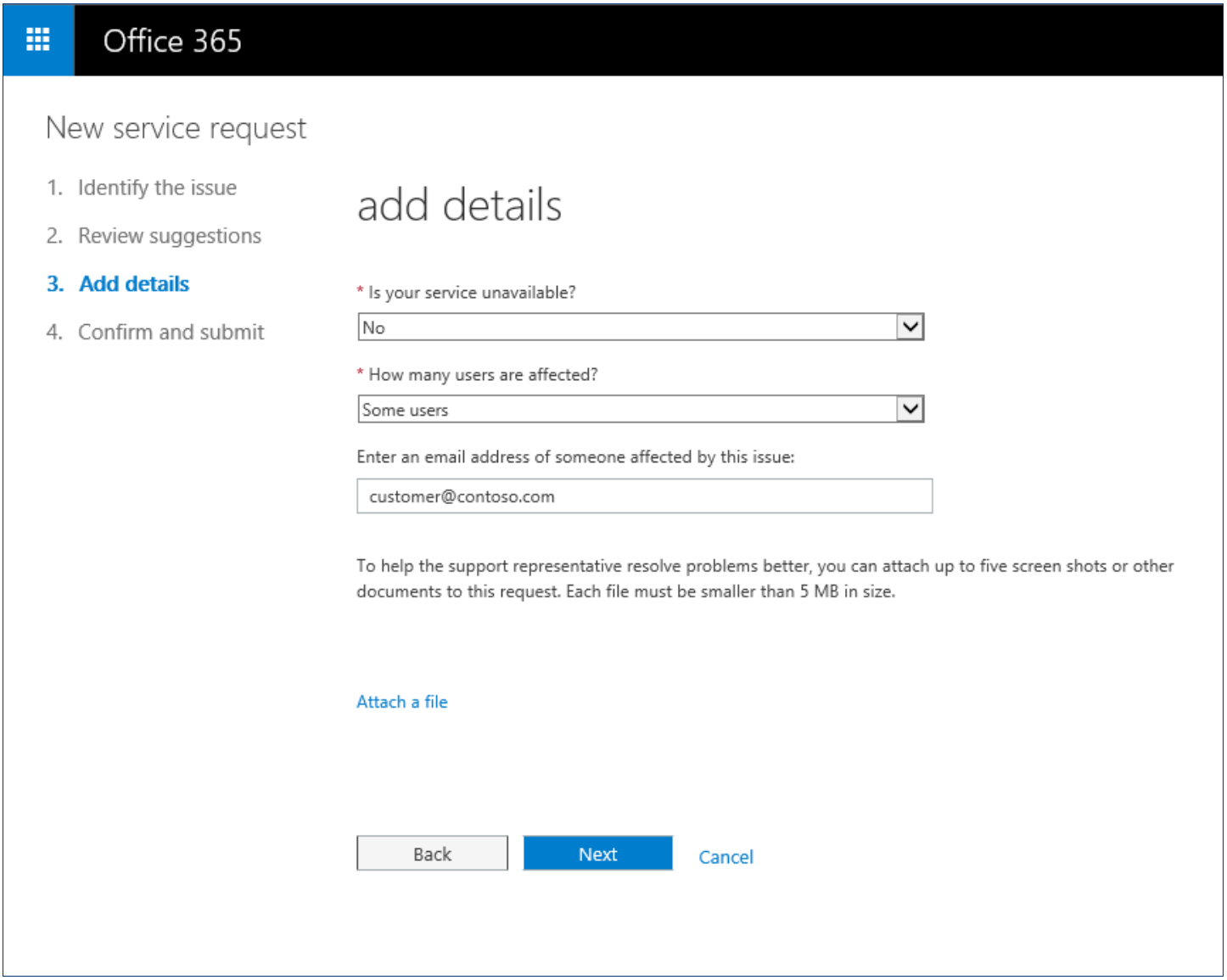

Office 365
New service request
1. Identify the issue
2. Review suggestions
3. Add details
4. Confirm and submit
identify the issue
* Feature:
CRM Client for Microsoft Office Outlook
* Symptom:
Outlook synchronization
* Issue summary
Summarize your issue in one sentence.
* Issue details
In a few sentences, tell us what's going on. It's helpful if you include the steps to re-create the issue.
Next
Cancel

Microsoft


Office 365
New service request
1. Identify the issue
2. Review suggestions
3. Add details
4. Confirm and submit
review suggestions
We've found some things that might help...
CRM Integration with Office 365, Benefits and Installation ...
CRM Integration with Office 365, ... customer testimonial from BioMedix describing the value of using a joint Office 365 and Microsoft Dynamics CRM Online ...
Troubleshooting Microsoft Dynamics CRM for Outlook installation, configuration, and upgrade
TechNet Library. Microsoft Dynamics ... Choose Start > All Programs > Microsoft Dynamics CRM 2015 > Diagnostics > Synchronization Troubleshooting ... Contact Us ...
Outlook 2007 won't connect - Microsoft Office 365 Community
Microsoft Office 365 Community Forums Email and calendar Outlook 2007 won't connect. ... the service that Outlook uses to communicate to Office 365) ...
Office 365 DIY Troubleshooter – self-help technical ...
Need to configure, troubleshoot or understand a part of Office 365? We have lots of articles and tools to help but finding them can be difficult.
Outlook 2007 hangs - Microsoft Office 365 Community
Since we migrated to O365 we have had a number of people report that their Outlook ... to Office 365. I won't be the ... Outlook /safe *does not* stop the CRM add ...
Using Office 365 Outlook/ adding domain. | Office ...
Microsoft Office 365 Community Forums Office applications Using Office 365 Outlook/ adding domain. ... Using Office 365 Outlook/ adding domain.
Do you still need to create a service request?
Back
Yes, continue
No, cancel request

Microsoft


Office 365
New service request
1. Identify the issue
2. Review suggestions
3. Add details
4. Confirm and submit
add details
* Is your service unavailable?
No
* How many users are affected?
Some users
Enter an email address of someone affected by this issue:
customer@contoso.com
To help the support representative resolve problems better, you can attach up to five screen shots or other documents to this request. Each file must be smaller than 5 MB in size.
Attach a file
Back
Next
Cancel

Microsoft

Best Practices for Working with Microsoft Support

- Whenever you contact Technical Support, the **more information you provide upfront**, the faster we can help resolve your issue.
- Provide **details** such as:
  - Is the issue affecting all users?
  - If not, how many users are being affected?
  - Which roles are being affected?
- Our **Commitment to You**:
  - Serving you, our customer is our #1 priority
  - We take pride in being friendly, responsive and easy to work with

Microsoft

Community-Based Resources

Microsoft Dynamics CRM Community
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Dynamics CRM User Group (CRMUG)
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CRM Online Service Team Blog
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CRM Support Team Blog
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Social Media Sites
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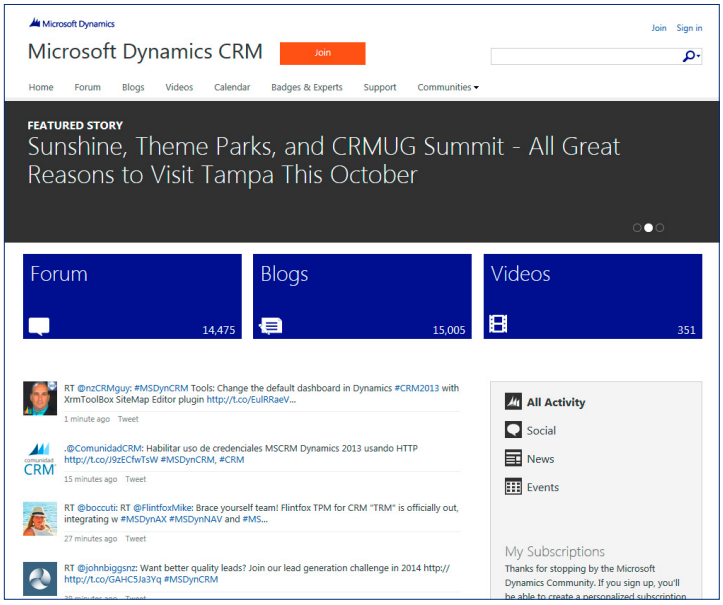
Microsoft

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

Microsoft Dynamics CRM Community



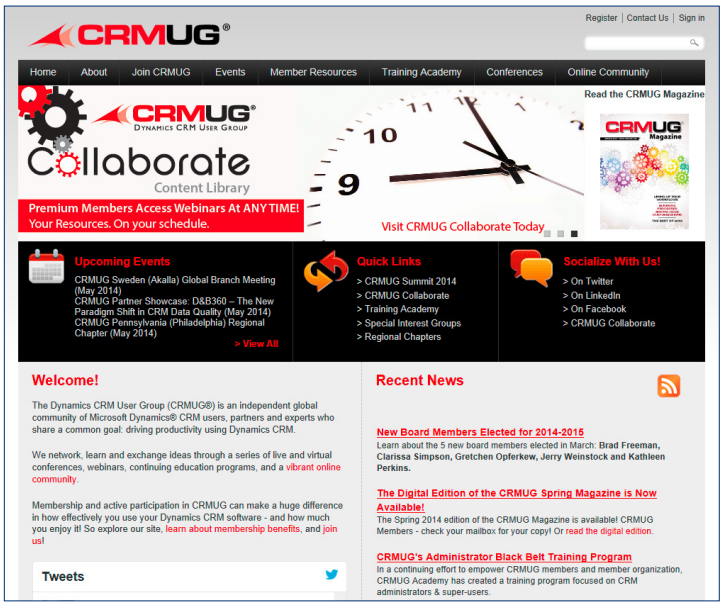
Go to http://community.dynamics.com/crm/default.aspx

The Dynamics CRM Community is your place to:

- **Learn from the experts**, and share your expertise!
- **Exchange ideas** with other users
- Hear the **latest news** from Microsoft
- Read **blogs** from Microsoft and our CRM Partners, including the Dynamics CRM Support Team
- Watch great **videos** all about CRM!

Microsoft

CRMUG



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

CRM Online Blogs

CRM Online Service Team Blog:

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

The Service Team Blog will provide you:

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

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CRM Support Team Blog:

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

The Support Team Blog will provide you:

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

Social Media Sites

Microsoft