

# **Microsoft Dynamics CRM**

**Technologies supporting Microsoft CRM**

**Server Architecture**

**Components Application**

**Planning your Deployment**

# Agenda

- Microsoft Dynamics CRM Overview
  - Features
  - Modules
- Installation and Deployment
  - Technologies supporting Microsoft CRM
  - Components of Microsoft CRM Application
  - Server Architecture
  - Setup features
  - Planning your Deployment

## WHY use - Microsoft Dynamics CRM

- Over 15,500 customers from small to enterprise
- Over 750,000 users in more than 80 countries
- Global network of software and services partners
- *Fast, flexible, and affordable*
- **Full CRM suite** of marketing, sales, and service
- **Native Office** experience for rapid adoption
- **Multi-language** with more than 25 languages
- Advanced **SOA / Web services** architecture

# Microsoft's Vision



Works the way  
you do



Works the way  
your business does



Works the way  
technology should

Deliver an easier  
and more natural  
user experience

Deliver highly  
configurable workflow  
and analytics

Deliver a flexible  
platform that  
simplifies integration

Microsoft Dynamics CRM  
Not just account /contact management



Business Application Platform

#### Complete CRM Suite

- Sales, Marketing, Service
- Activity Tracking
- Rich Reporting, Analytics

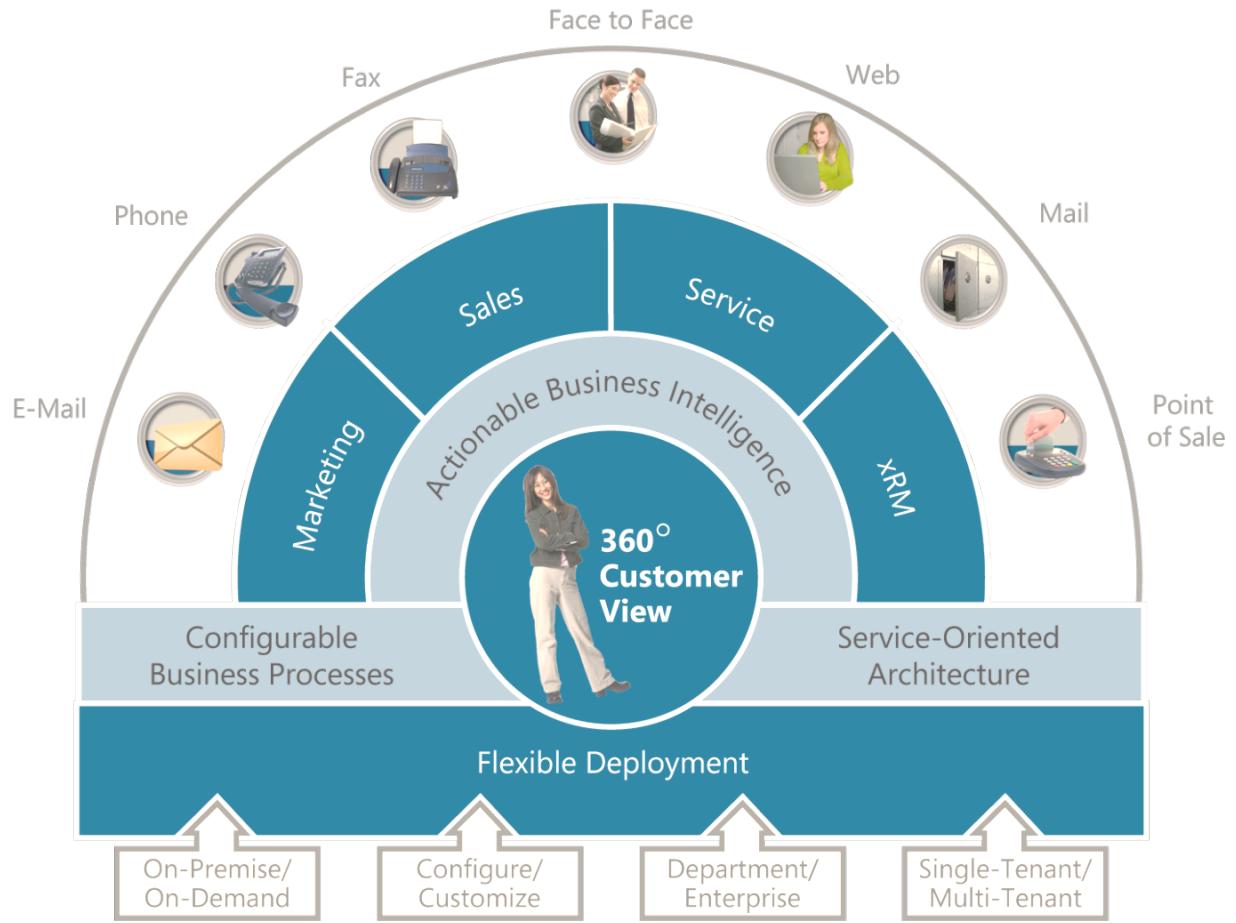
#### Rich Platform

- Deep process automation
- Easy configuration and customization
- Extensible architecture
- SDK + Web Services

# Microsoft

**Full CRM suite  
capabilities and  
application  
flexibility**

- Interactions
- Marketing
- Sales
- Service
- xRM
- Business Process
- SOA
- Flexible
- Deployment



# Essentials of a Platform

## Architecture

- Data
- Presentation
- Process
- Security
- Extensibility

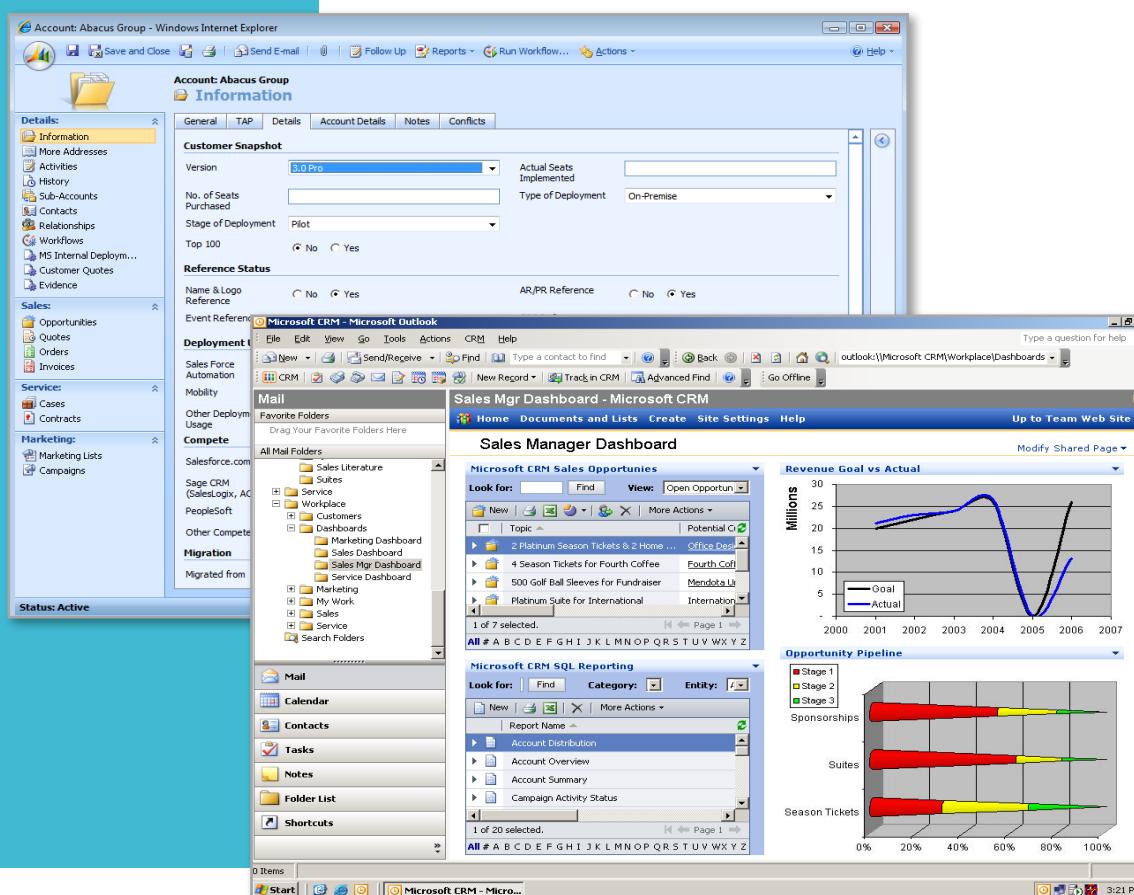
## DEPLOYMENT

- SaaS/ On-Premise
- RICH/WEB/MOBILE CLIENTS

## Operations

- Analytics and Reporting
- Data Lifecycle Management
- Manageability

## Fast, Productive Sales Force Management



- **Familiar interface** drives user adoption and increased productivity
- **Workflow-driven** sales processes ensure consistency and efficiency
- **Full spectrum of sales intelligence** capabilities provides insight and accurate forecasts



# Enterprise CRM Scenarios

## Multinational Deployments

Support business units across the globe in different languages and currencies

## Single Contextual UI

Aggregate and analyze data from diverse sources into a single customer view

## Multitenant CRM

Benefit from the best of the on-demand and on-premise deployment models

## Surround Deployments

Increase user adoption of legacy CRM and migrate over time

## xRM

Reach beyond the traditional boundaries of CRM

# Powered by Microsoft Dynamics CRM



## Tight Microsoft Office Integration

- Native Outlook client
- Seamless integration with MS Office

## Robust Workflow Capabilities

- Geared for the business user, guided UI
- The inherent flexibility to use across groups/systems

## Seamless Remote Capabilities

- Robust Offline solution
- Multitude of mobile device access options

## Ease of Customization and Integration

- Web-Services based, Open API for easy integration
- Architected for easy customization and configuration

## Flexible Delivery Options

- Single code base across on-premise, on-demand, hybrid
- Host it internally for ultimate flexibility and control

## Why Invest in CRM in a Tough Economy?

- Maximize your return on your company's investments in sales, service, and marketing
- - Maximize the value of every existing customer relationship
- - Drive real-time visibility of all customer-facing processes



## Agenda

- Introduction to Microsoft Dynamics CRM
- Technologies supporting Microsoft CRM
- Components of Microsoft CRM Application
- Server Architecture
- Setup features
- Planning your Deployment
- Installing Microsoft CRM Server
- Deployment Options
- Installing Microsoft CRM Outlook client
- The Microsoft CRM Email Router
- Q & A

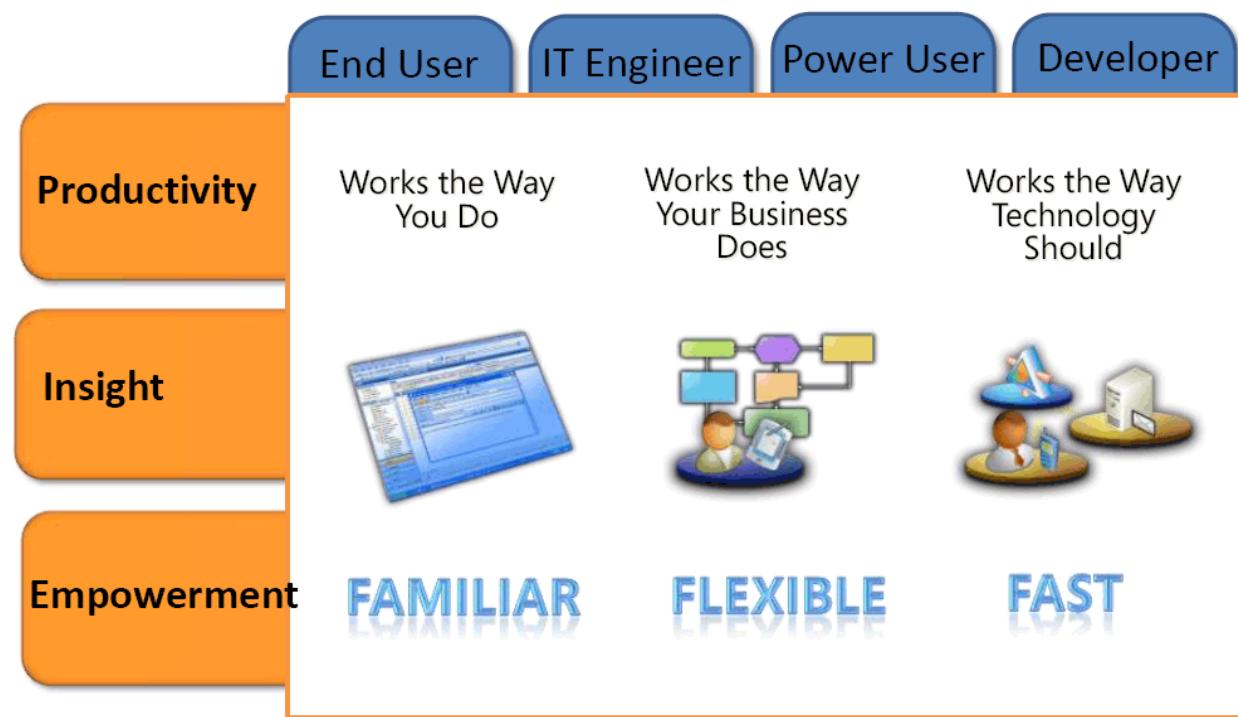
## What is Microsoft CRM?

"Microsoft Dynamics CRM is a fast, flexible, and affordable solution; for driving consistent and measurable improvements; in customer relationship management activities"

- It works the way you do
- It works the way your business does
- It works the way technology should
- Provides the power of choice

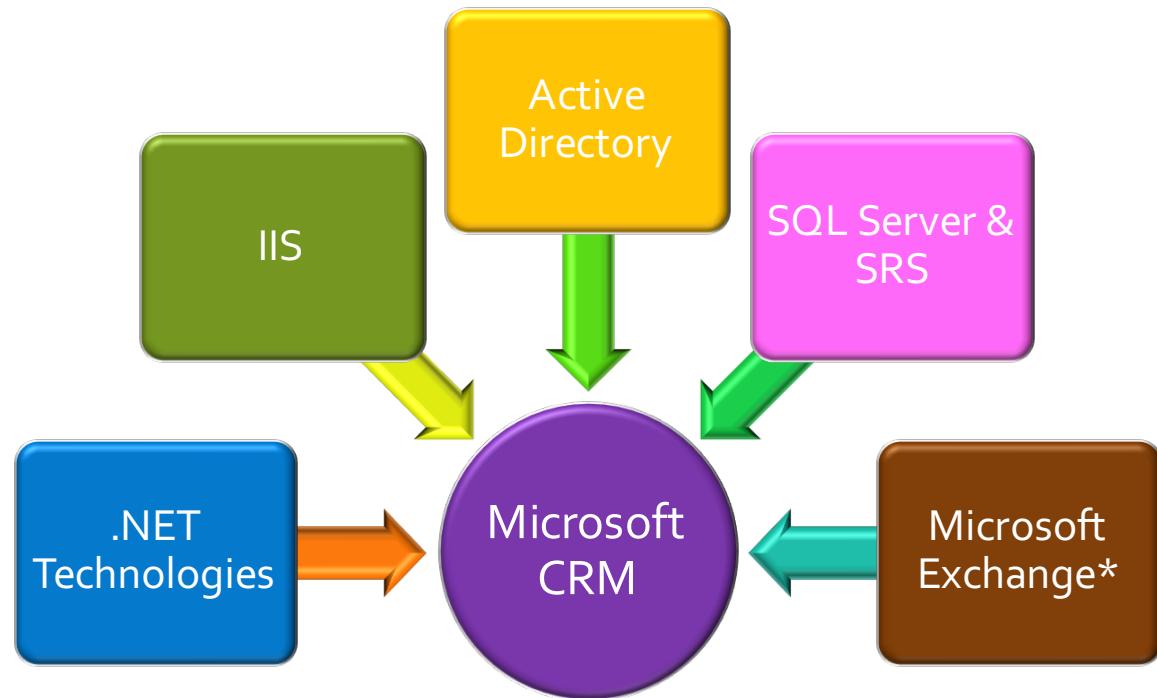
\* Microsoft Dynamics CRM 4.0 code named Titan

## Delivers value for all

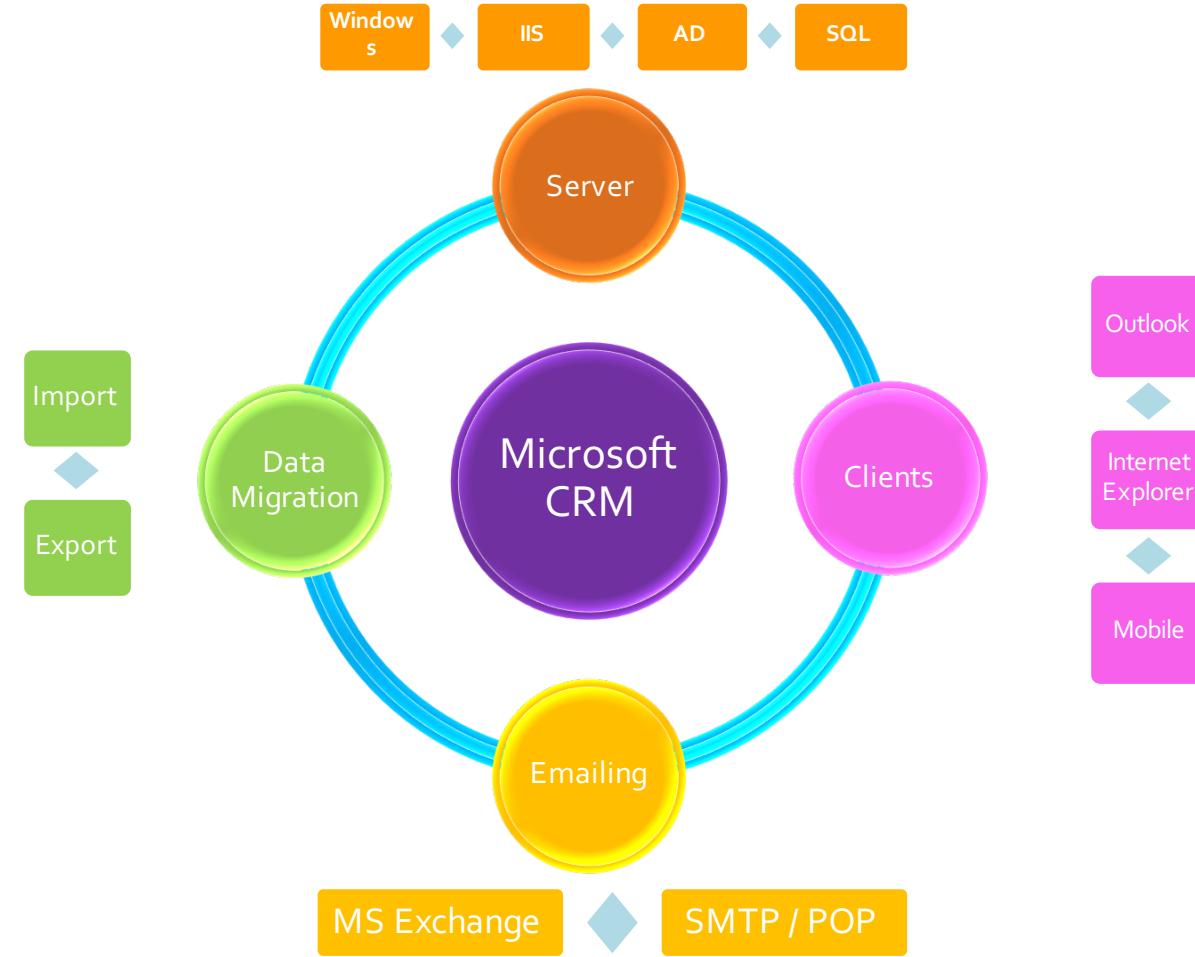


## The Technologies

Microsoft CRM integrates and works with the following technologies



## The components



## The CRM Server

The Microsoft Dynamics CRM Server architecture can be divided into the following conceptual layers:

- Presentation
- Application
- Platform
- Database

## The Server Layers

### Presentation Layer

- The topmost layer of the Microsoft Dynamics CRM architecture.
- These are components through which users can access the CRM Application

### Application Layer

- In this layer, most application logic revolves around data validation.
- There is almost no business logic within the application layer.

### Platform Layer

- This is where the actual business logic is validated on the server.
- This processing could either be synchronous or asynchronous.

### Database Layer

This is the lowest layer in the architecture.

The database layer includes databases and a well-defined data access layer

## **Key Features of Microsoft Dynamics CRM 4.0 Setup**

- Simplified Active Directory integration
- Environmental Diagnostic Wizard
- Bundled Licensing (Uses PID)
- Microsoft Dynamics CRM product Registration
- Installation Rollback and Repair

## Planning Your Deployment - Factors

Some of the factors affecting requirements planning include the following:

- The number of servers involved and how they are configured
- The fact that Microsoft CRM depends on Microsoft® SQL Server® 2005
- The number of users the Microsoft Dynamics CRM implementation will support
- The integration of Microsoft Dynamics CRM with the Microsoft Exchange servers
- The performance of your servers and the local area network
- Networking and security components

## Planning your deployment - Approach

The Microsoft Dynamics CRM implementation process should be carefully performed in phases

Before installing Microsoft Dynamics CRM, analyze your current network infrastructure

- What hardware and software do you already have?
- What existing hardware and software can be used in your Microsoft Dynamics CRM implementation?
- What hardware and software must be purchased before installing Microsoft Dynamics CRM?

## Planning your deployment - Hardware

Verify your current hardware infrastructure:

Servers:

- Processor
- Memory
- Hard Drive space
- Client / Server setup
- Networks

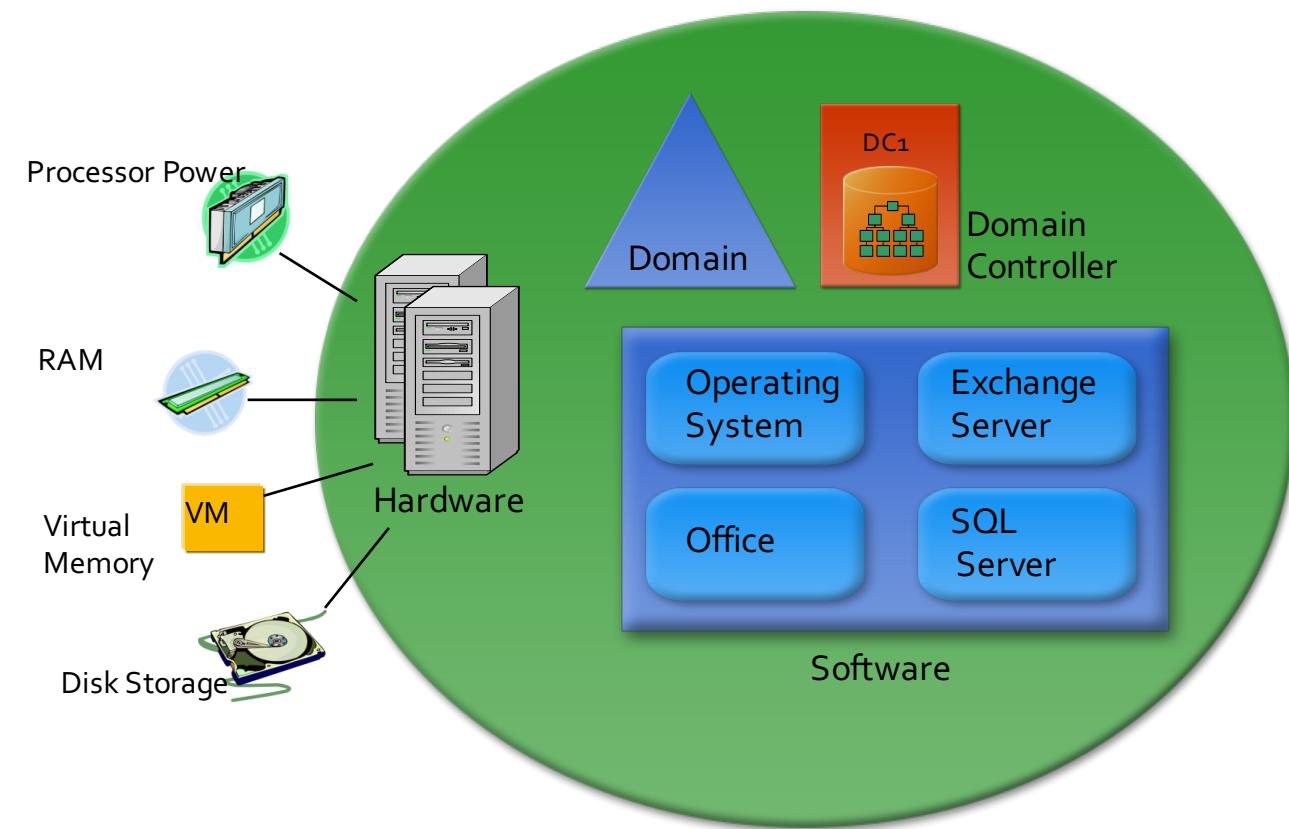
Plan for the future when purchasing Hardware

## Planning your deployment - Software

Verify current software components:

- Microsoft Dynamics CRM Server
- Microsoft Dynamics CRM Web Browser client
- Microsoft Dynamics CRM for Office Outlook
- Microsoft Dynamics CRM E-mail Router

## Planning Your Deployment – Complete Picture



## Server Support

### Windows Server

 Windows Server 2003

 Windows Server 2003 x64 Editions

 Windows Small Business Server 2003 R2

 Windows Server 2008

 Windows Server 2008 x64 Editions

### SQL Server

Microsoft<sup>®</sup>  
SQL Server 2005

Microsoft<sup>®</sup>  
SQL Server 2005 x64 Edition

Microsoft<sup>®</sup>  
SQL Server  
Code Name "Katmai"

### Exchange

Microsoft<sup>®</sup>  
Exchange Server 2003

Microsoft<sup>®</sup>  
Exchange Server 2007

## Platform and Tools



## Client Support

### Windows Client



### Office



### Web Client



### Platform and Database



## Microsoft Dynamics CRM 4.0 Licensing Model

- Microsoft Dynamics uses the Microsoft PID 4.0 licensing engine
- Generated license keys are pre-packaged with the product and appear on an orange sticker on the back of the CD.
  - Example: BBH2G-D2VK9-QD4M9-F63XB-43C33
- Encoded within a PID 4.0 license key is the following information:
  - SKU that was purchased
  - Language
  - Version number
- License types:
  - Full
  - Administrative
  - Read-Only

## Setup features

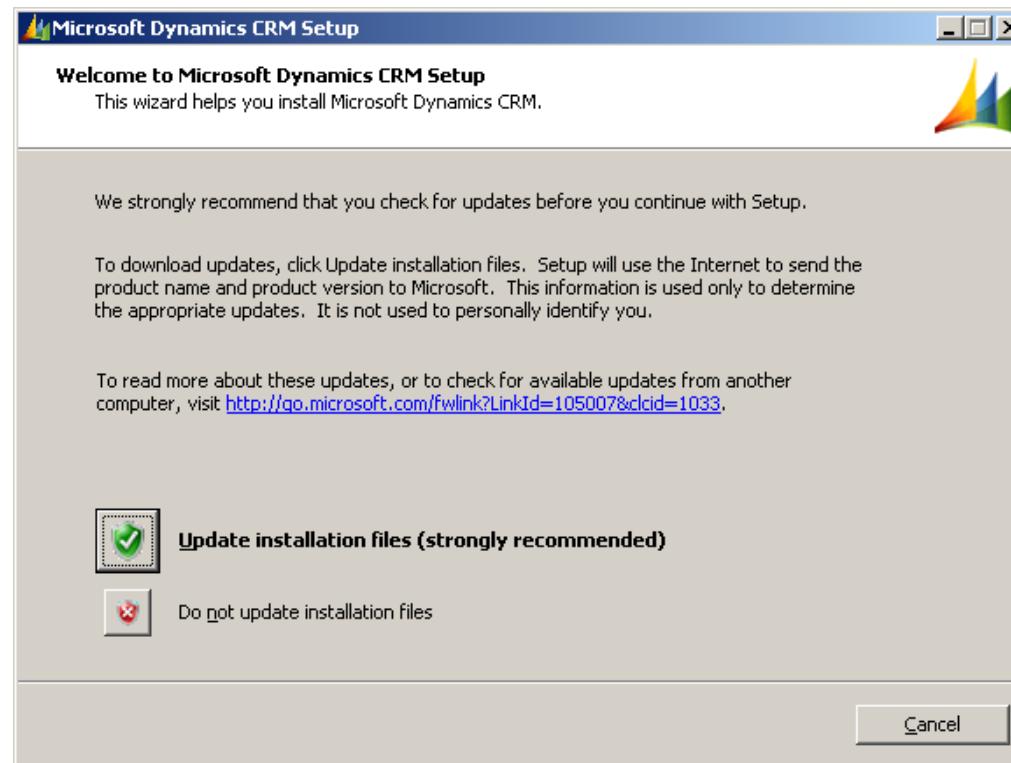
- Install from source media with GUI wizard
- Scriptable via command-line arguments and a installation XML file
- Supports both repairing an installation and uninstalling it
- Uninstalling CRM does not remove the databases
- Performs pre-requisite checks
- Includes the Environment Diagnostic Wizard (EDW)
  - Tests the environment and user input for the most common problems that might occur during setup
  - New feature in CRM 4.0 is greatly reduced setup issues and support calls

## Installing CRM Server

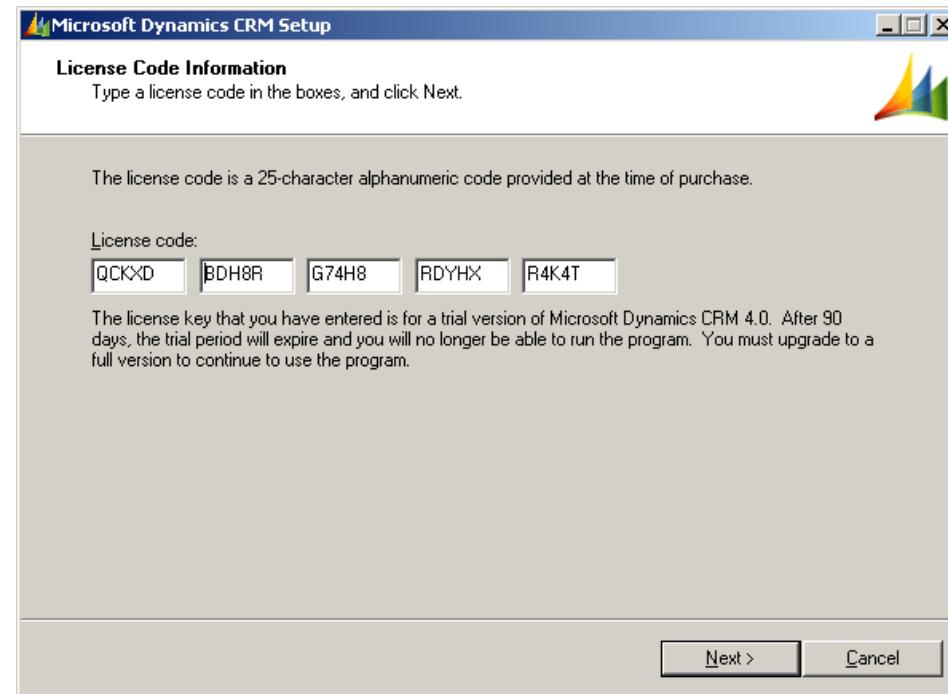
Directly from the installation disk or from installation source on the hard drive



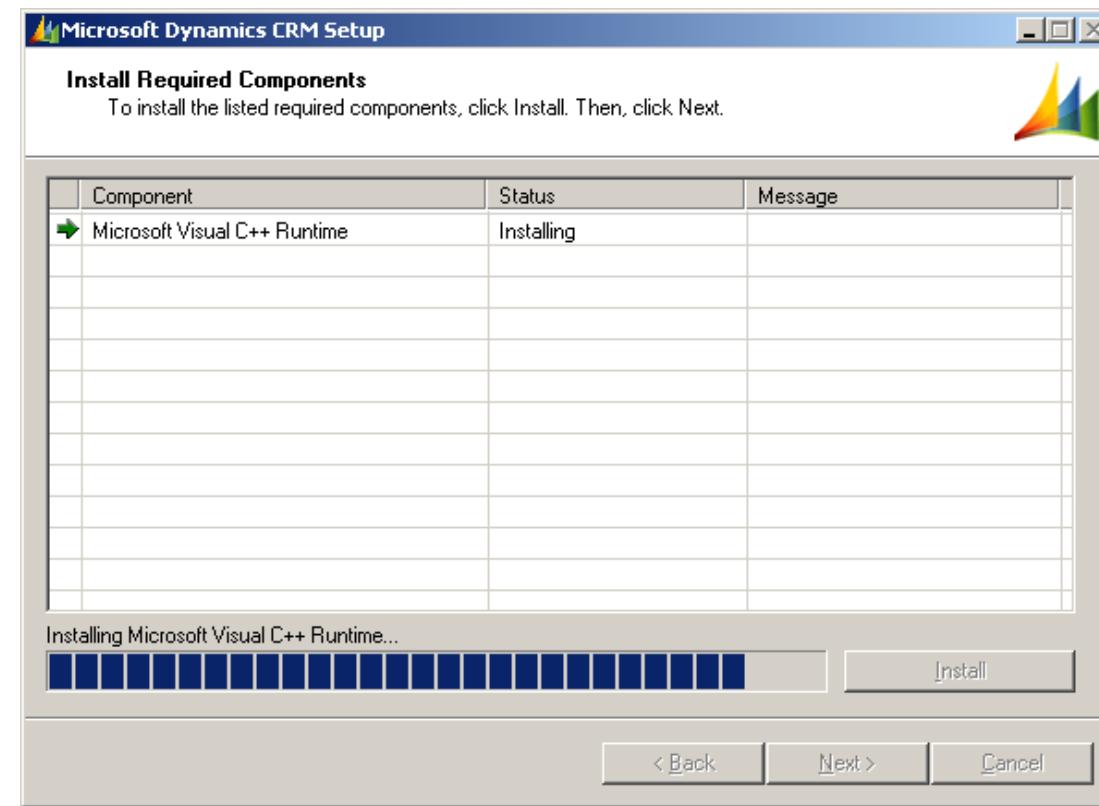
Update setup package



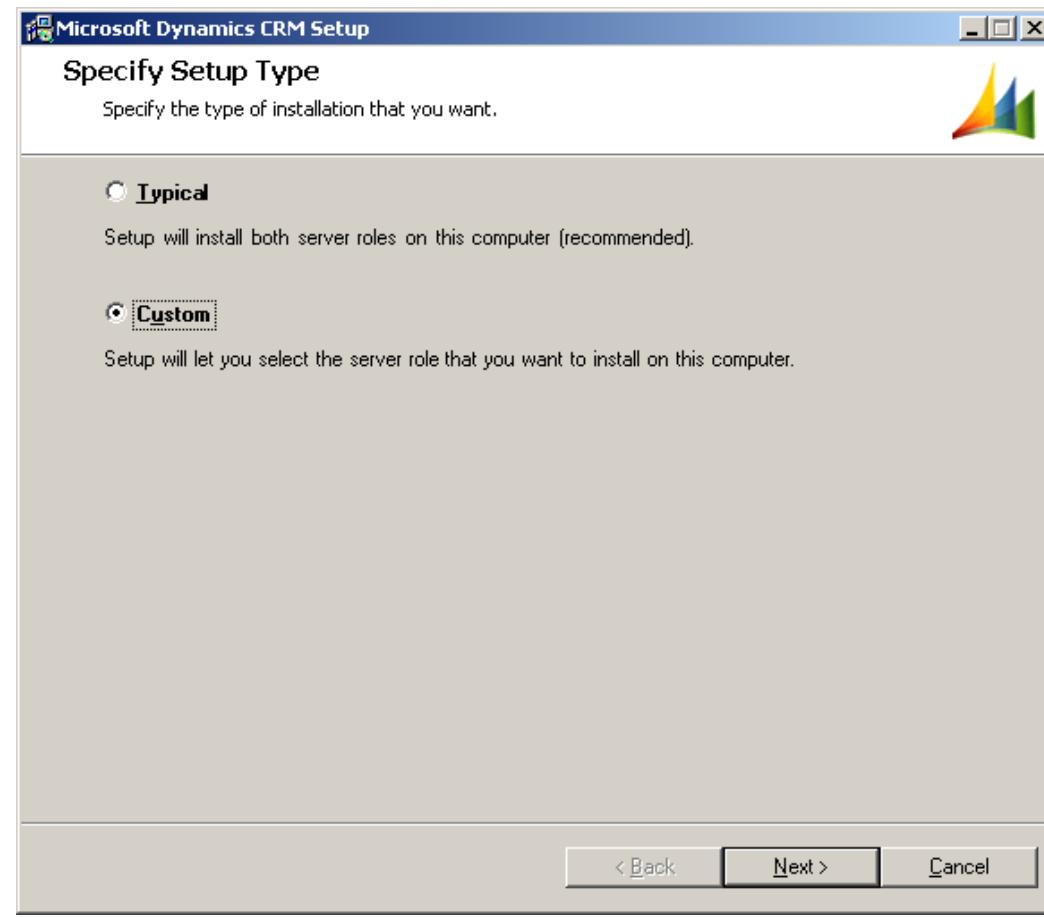
Product Key



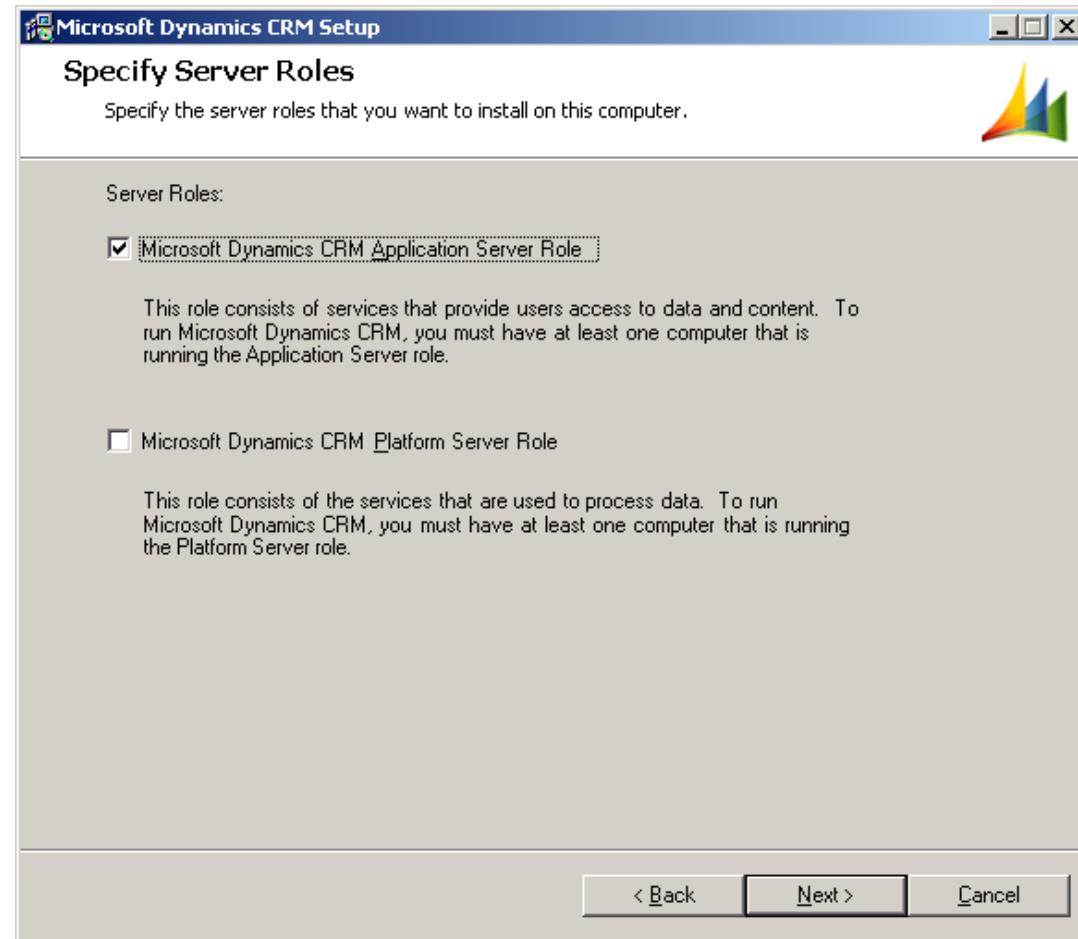
## Installation pre-requisites



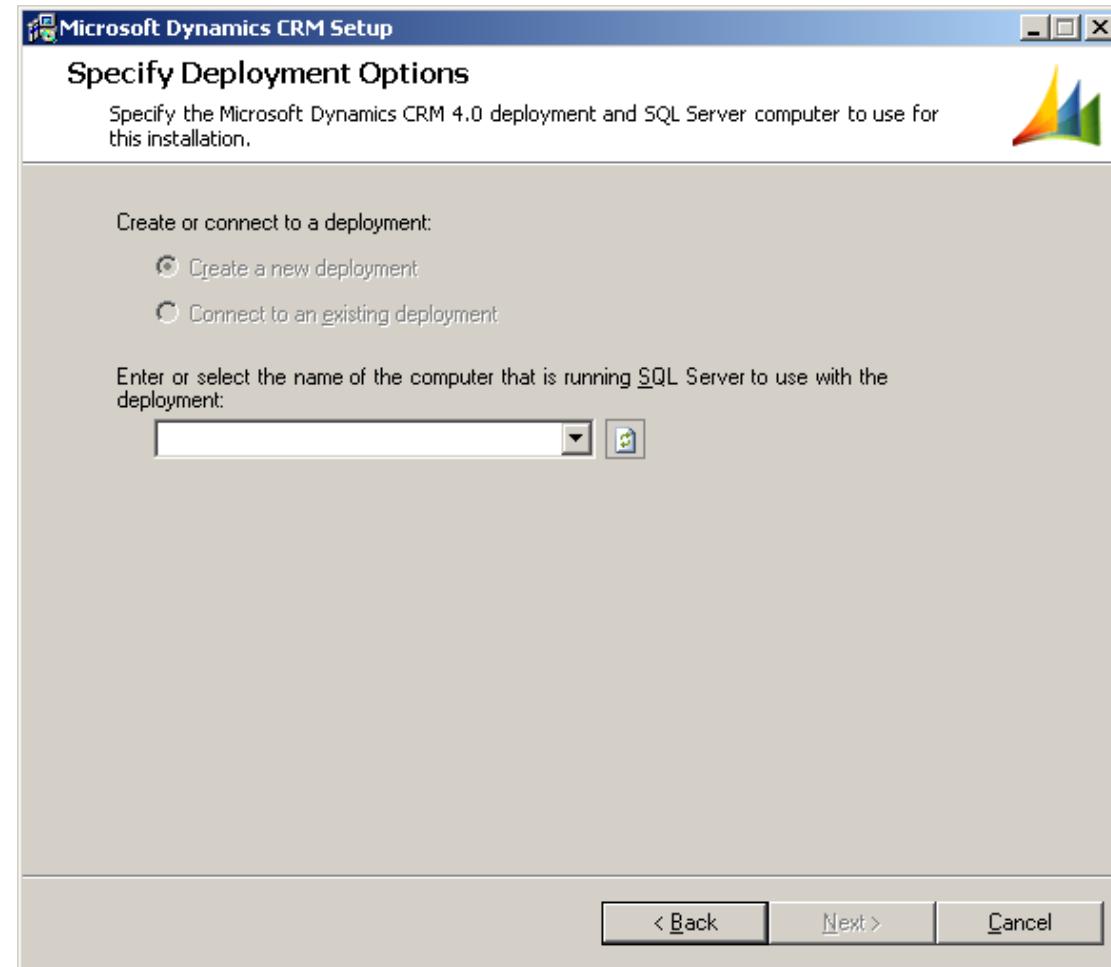
Type of installation



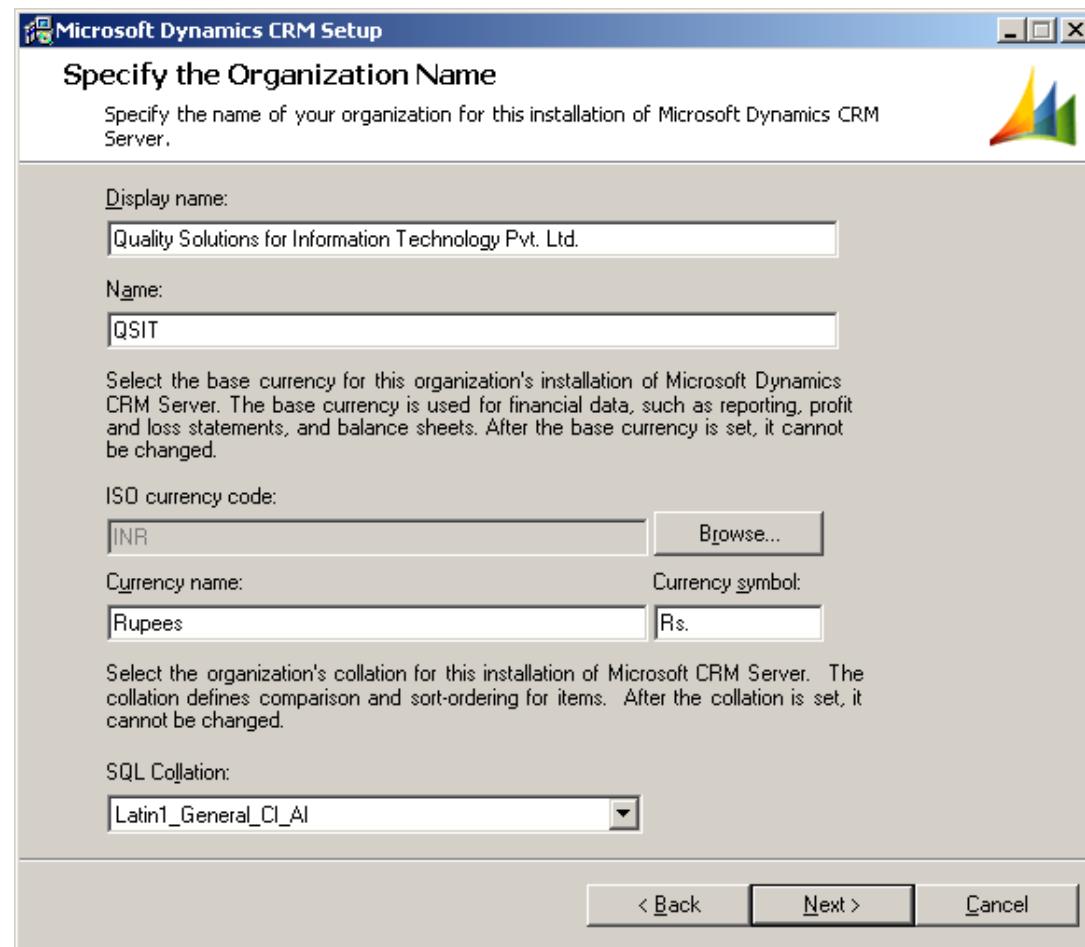
## Server Role



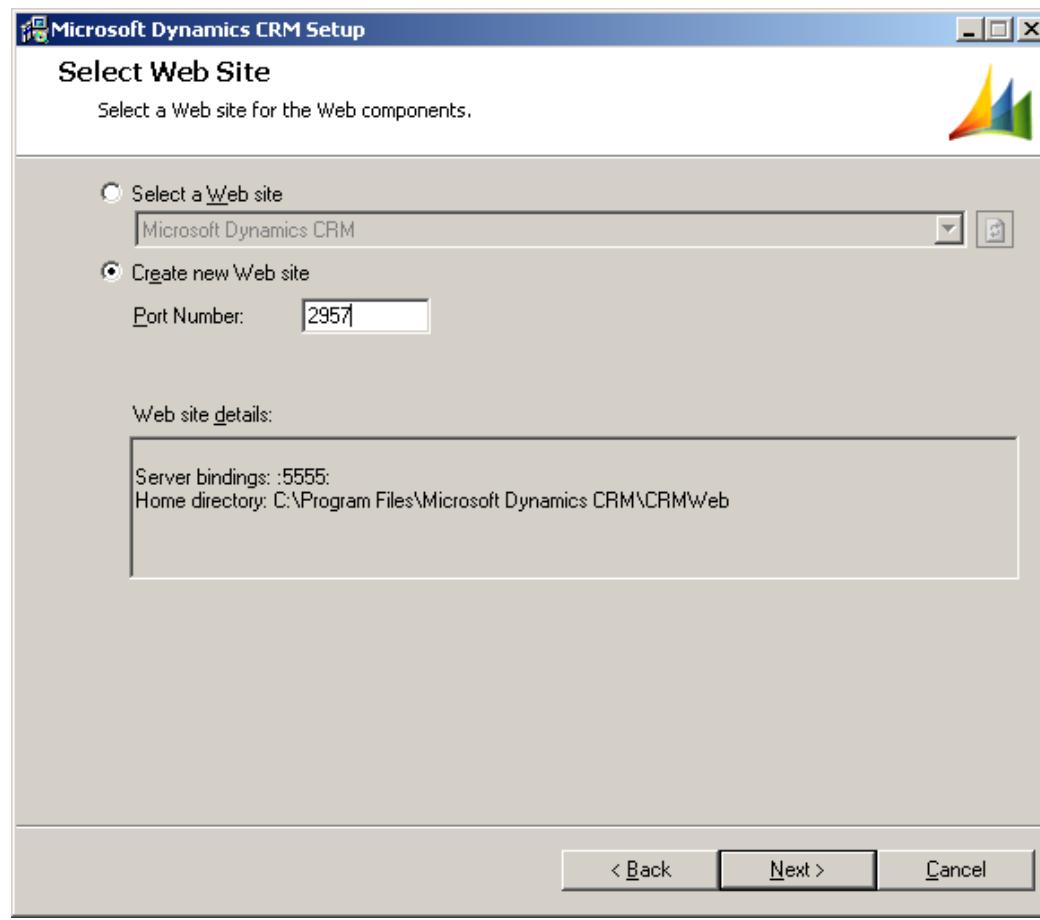
SQL Server



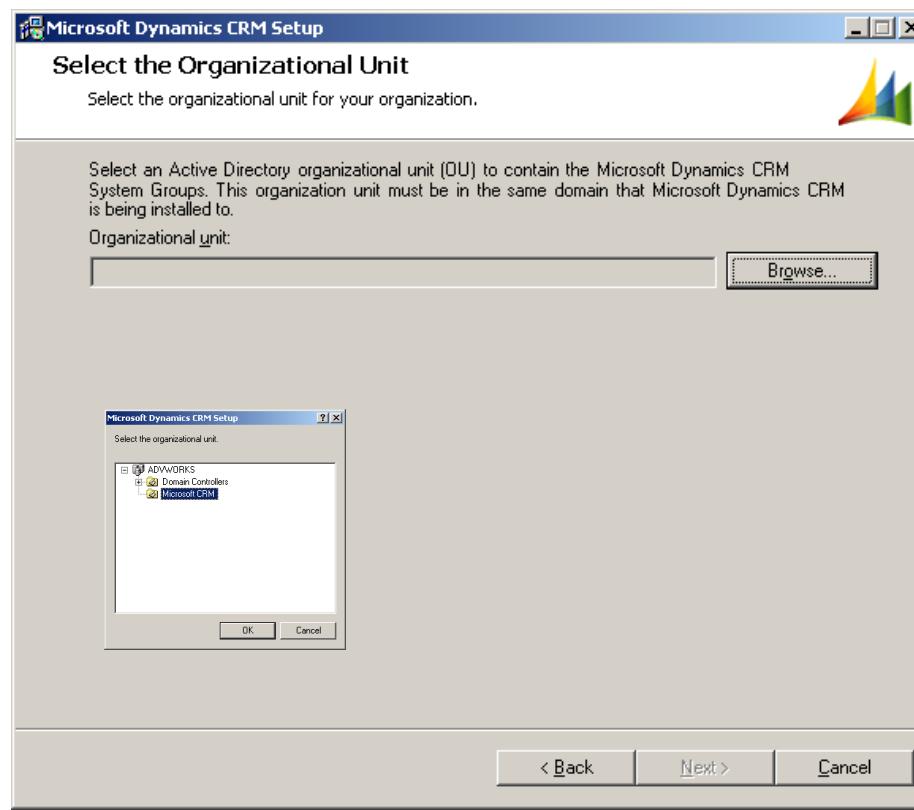
## Organization & Currency information



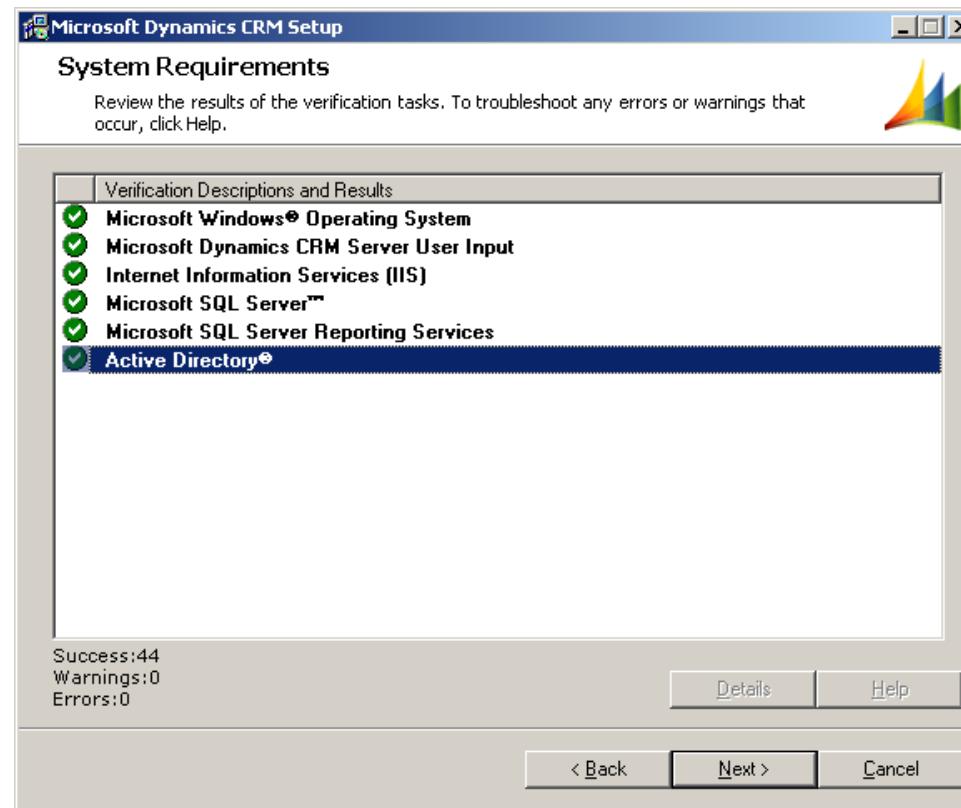
## IIS Configuration



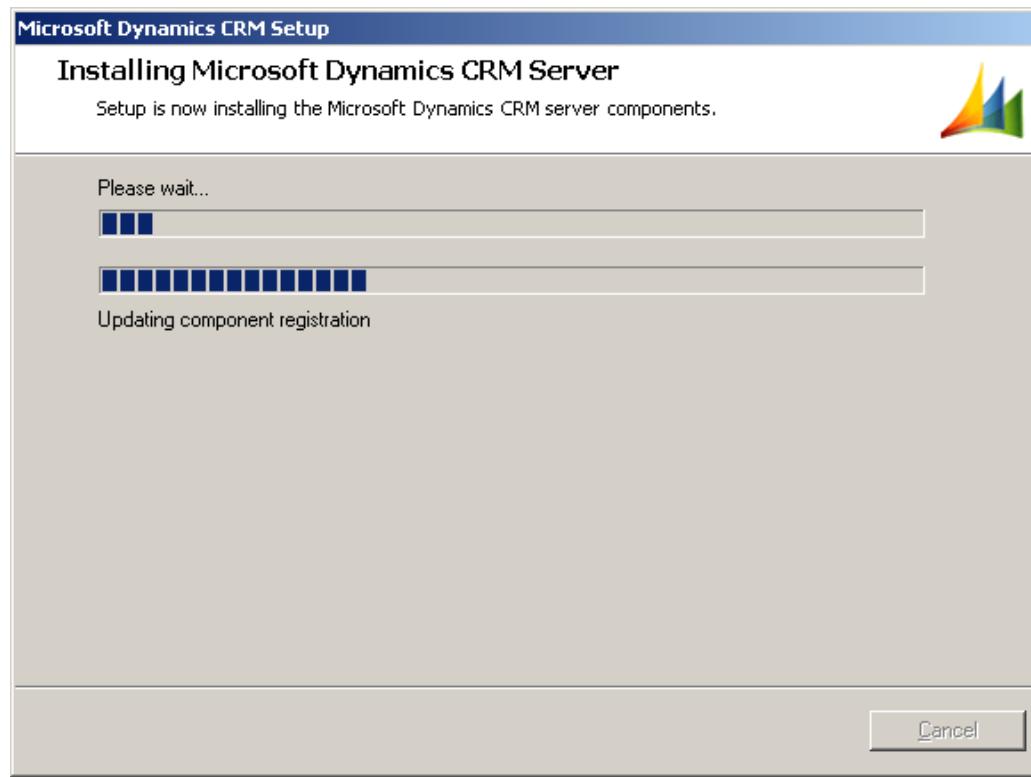
## Active Directory



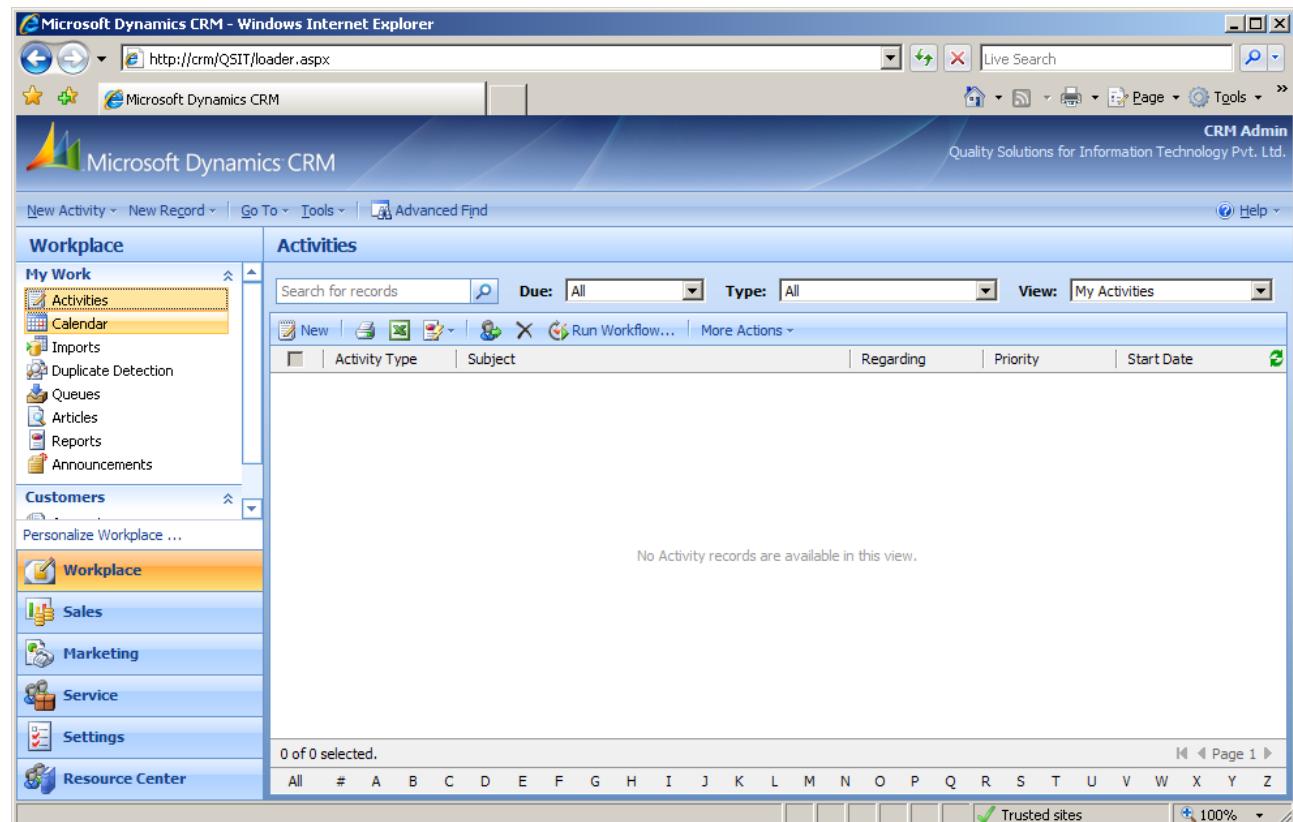
## Environment Diagnostics Wizard



The installation



## The Installed product



# Deployment Options

Choose how:  
Outlook, browser,  
mobile

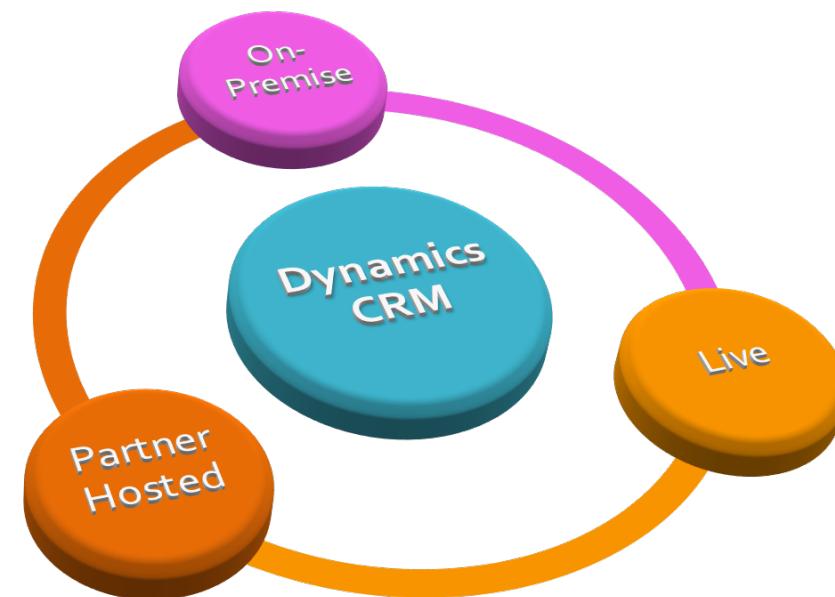
Choose what:  
Software or service

Choose where:  
Own it or rent it

Change your mind  
any time

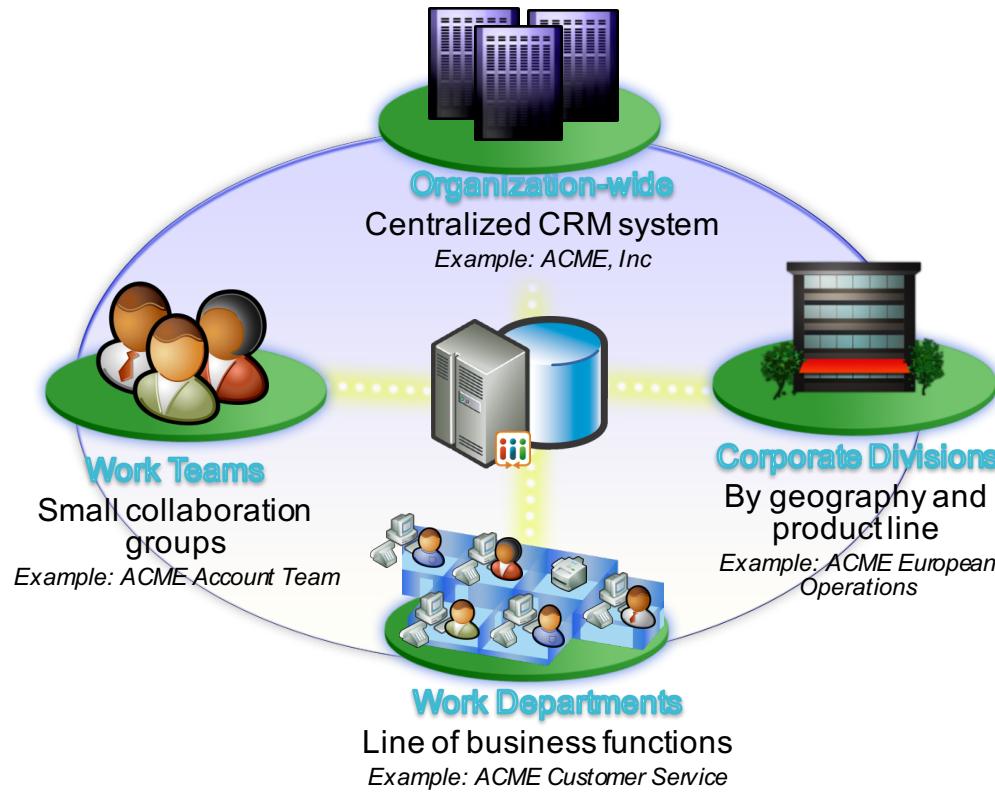
Shared code-based  
across versions, written  
with internet facing  
deployments in mind.

## Deployment Options: The Power of Choice



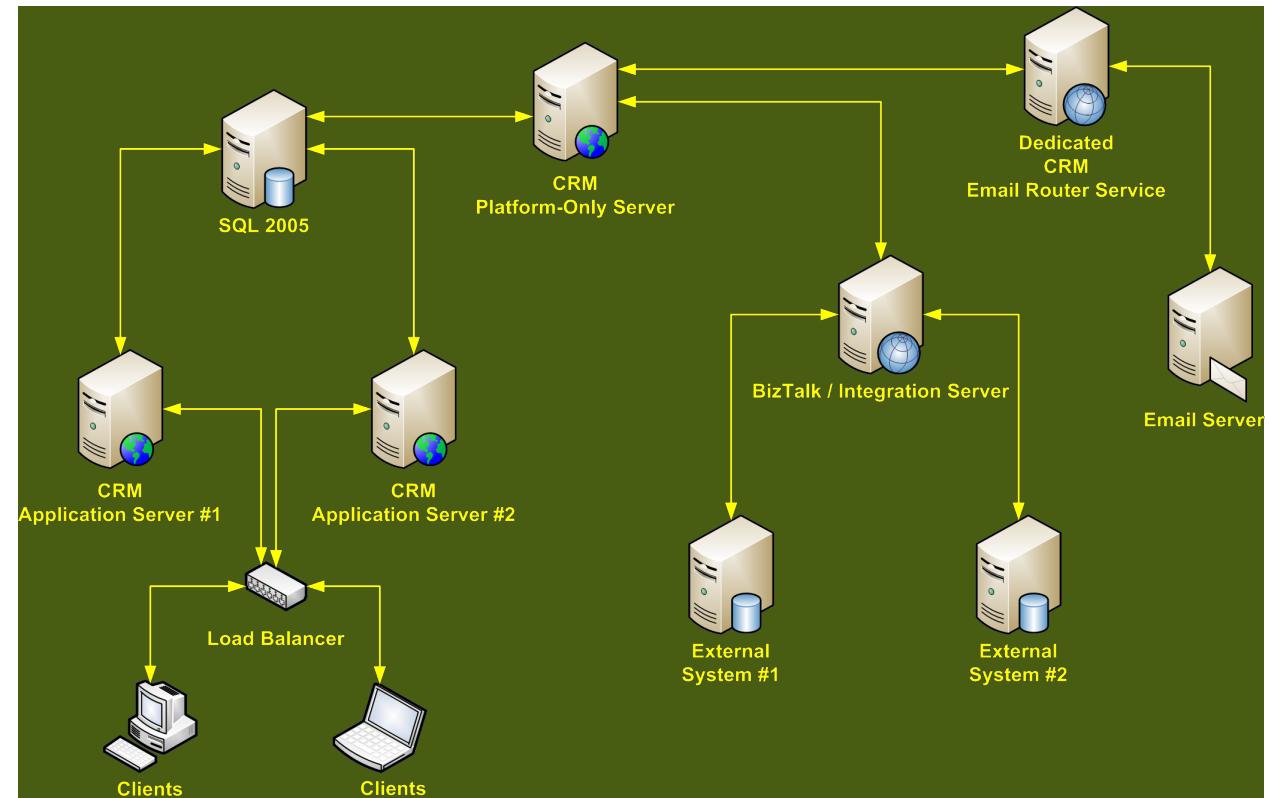
Deployment Choice  
Enhanced Architecture  
Internet-scale performance  
Enhanced application & platform customization  
Data lifecycle management

## Scale up and out easily



# Server Roles

Enable a range of scalable configurations

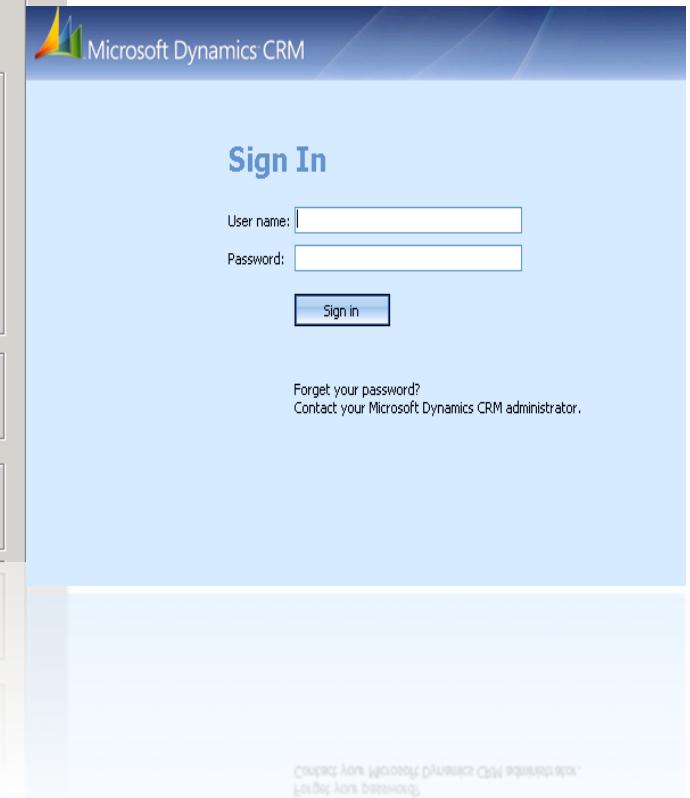
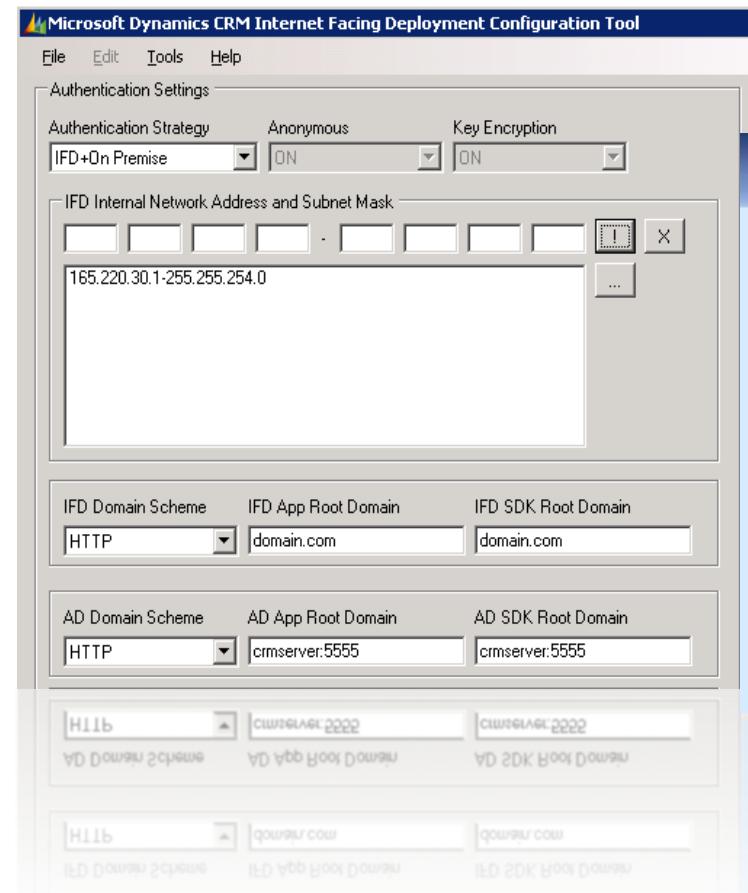


## Internet facing Deployment

Microsoft CRM 4.0 has been built to be web ready.

Using the IFD configuration tool, the application can be easily made available for access from outside the organization's network.

VPN not required to connect to CRM application over internet.



# Client Setup

*Installing the Outlook client*

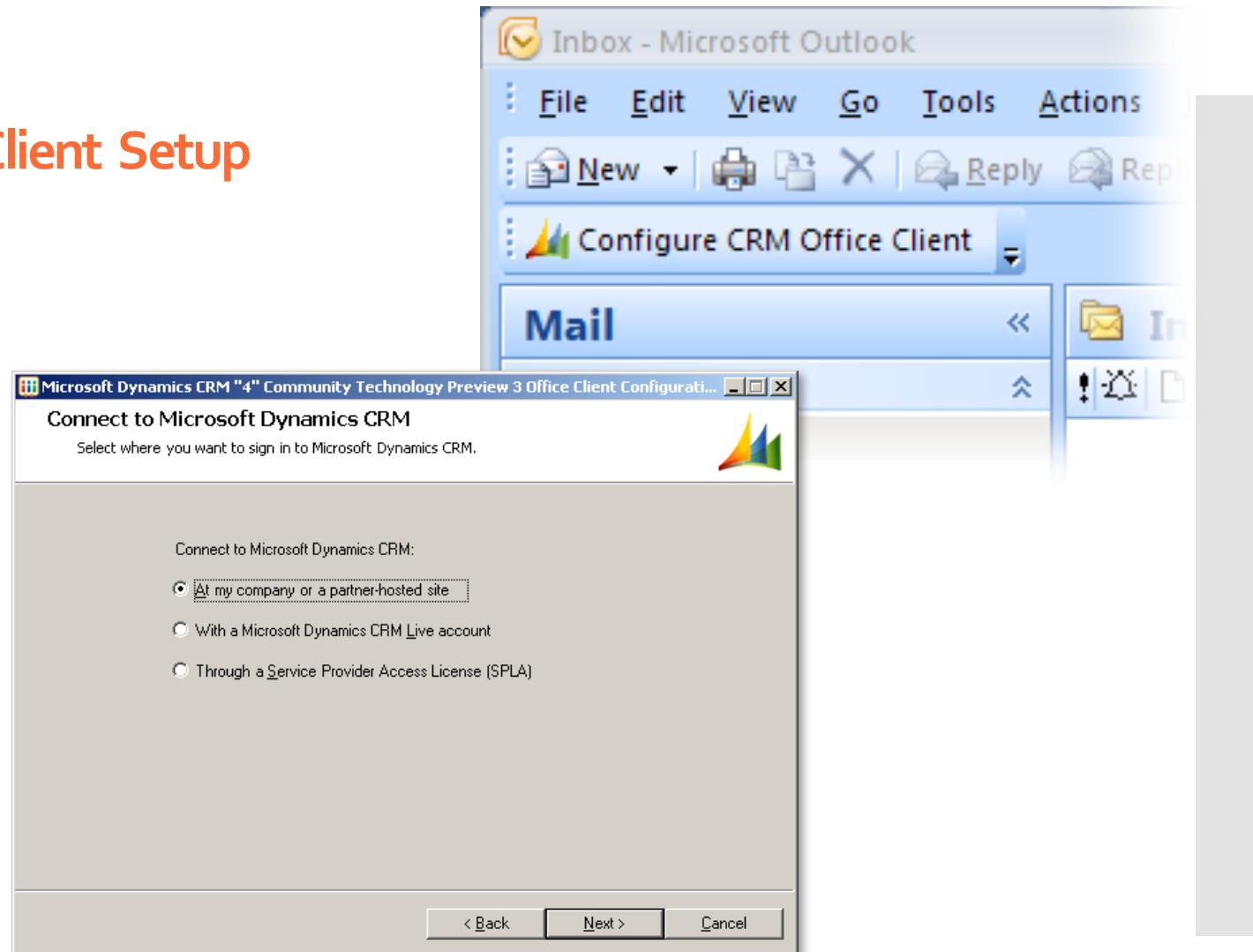
Installation is significantly faster as the installation and configuration are now two separate steps

Once the client is installed on the machine, different users can “configure” their copy.

Users can re-configure their client at any point in the future

Support for on-premise, Live and hosted

## Client Setup



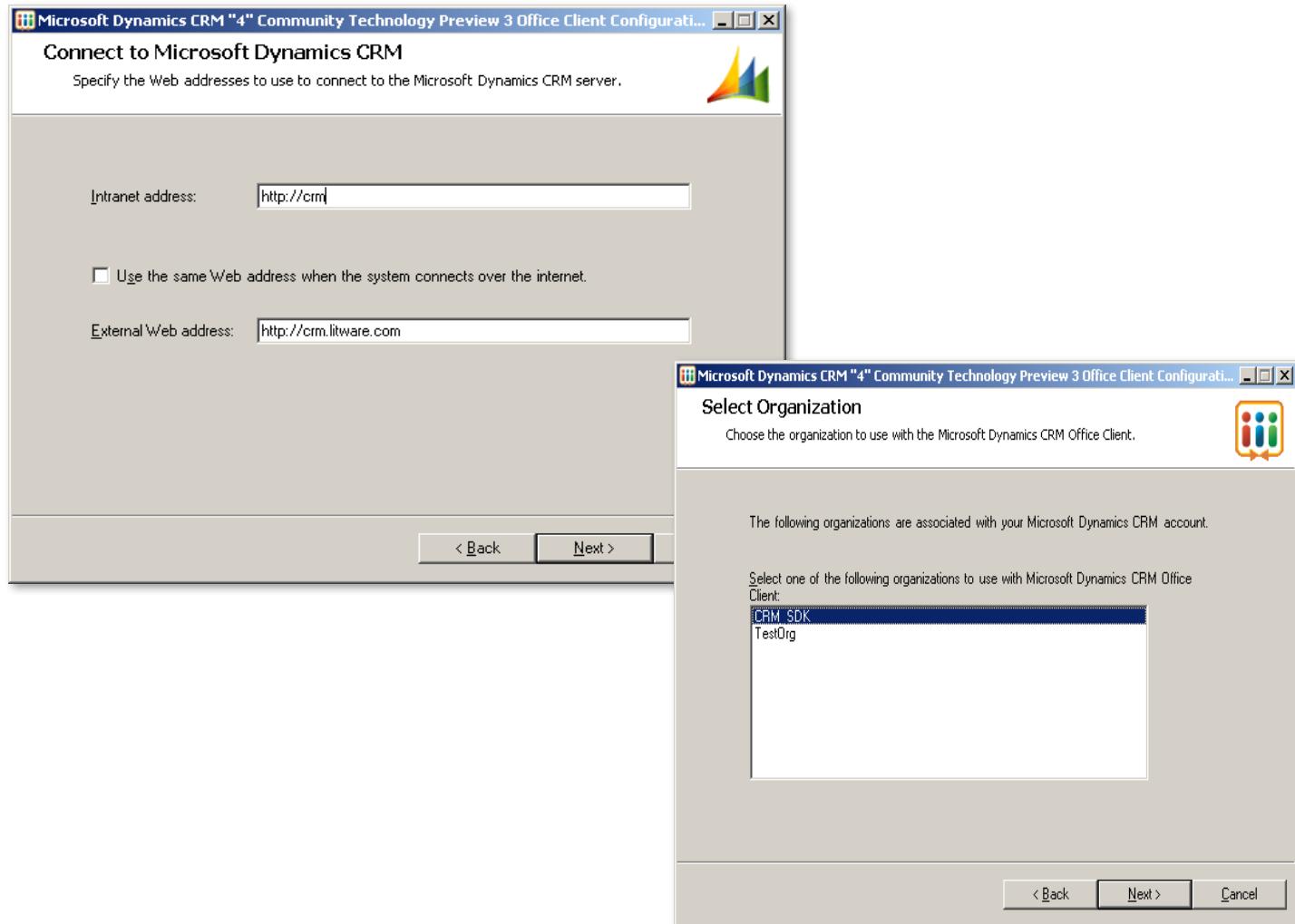
# Client configuration

“Internal” and “External” connection URLs

Multi-org aware (connect to one)

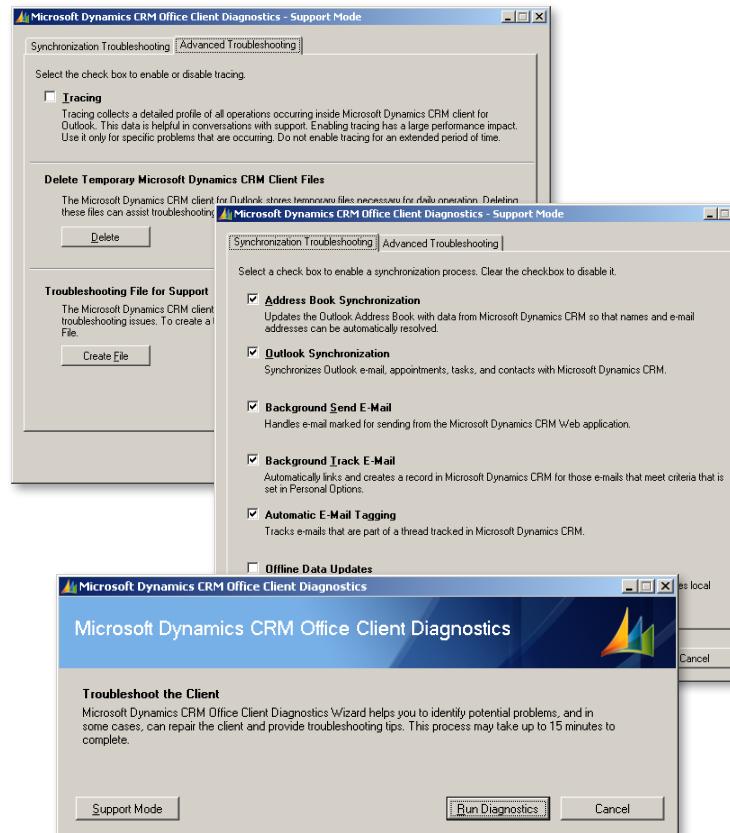
Check for updates

Configuring the client is now separate from setup and is used to “connect” the user’s client to a CRM installation and organization.



New “Client Diagnostic Wizard” that can be used to find and fix common issues

Also useful when calling support, allows easy enabling of tracing plus the creation of “Troubleshooting File” that can be used by Microsoft support.



# **The Email Router**

## E-mail Router Functionality

Microsoft Dynamics CRM incorporates email functionality to assist in the management of customer relationships, streamlines and automates communication channels, and facilitates the teamwork and collaboration of CRM users.

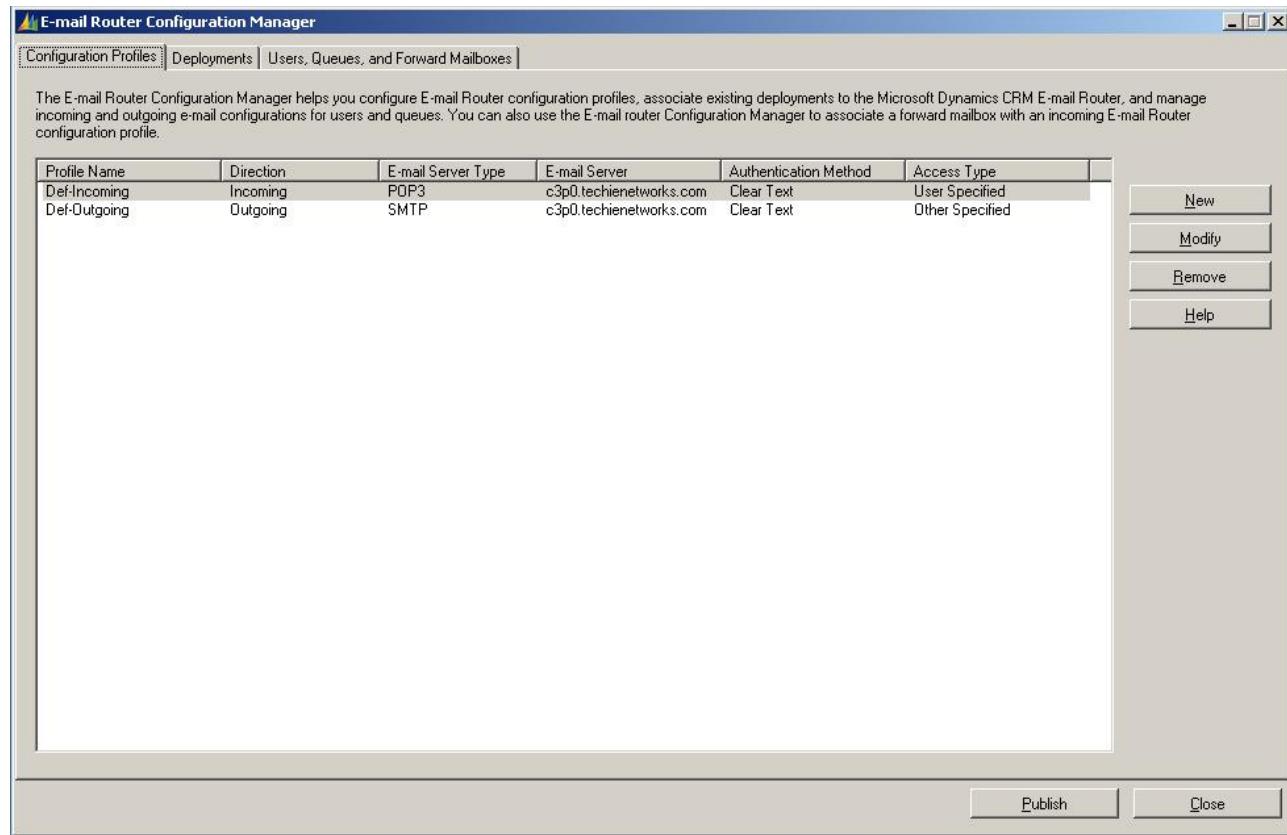
The Microsoft Dynamics CRM E-mail Router is a software component that provides an interface between:

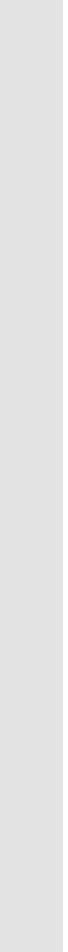
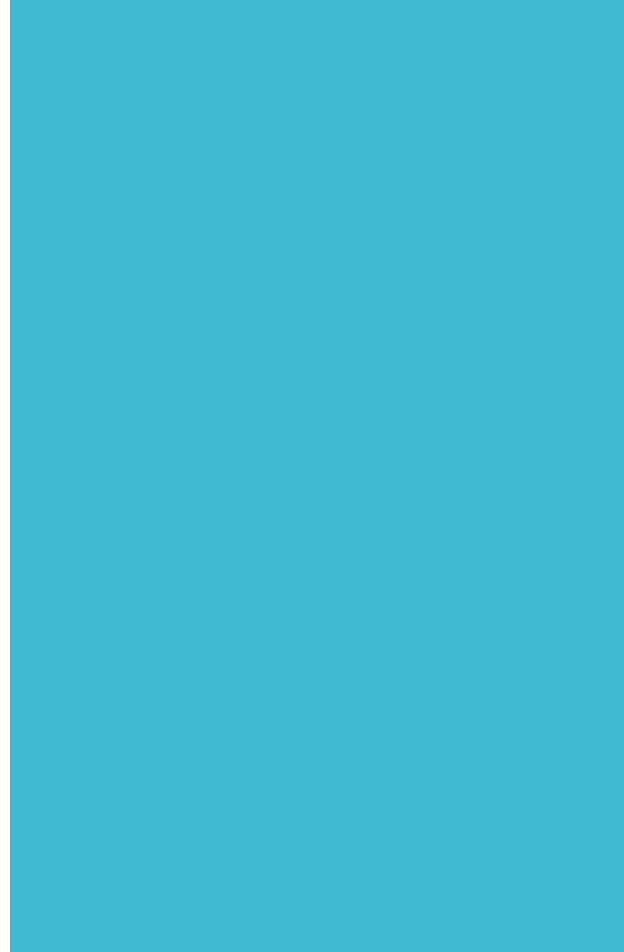
Microsoft Dynamics CRM, and

Any one of the following

- Microsoft Exchange Server 2003,
- Microsoft Exchange Server 2007,
- Simple Mail Transfer Protocol (SMTP), or a
- Post Office Protocol (POP3) compliant e-mail server.

## Configuring the Email Router





Thank you...