

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

Deliver an easier
and more natural
user experience



Works the way
your business does

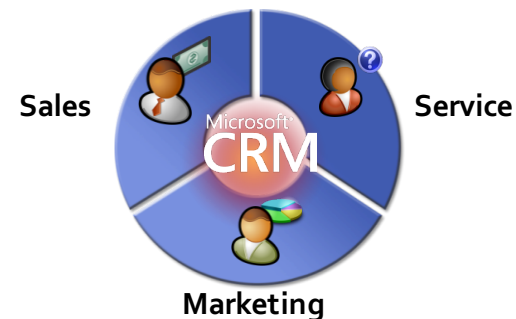
Deliver highly
configurable workflow
and analytics



Works the way
technology should

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

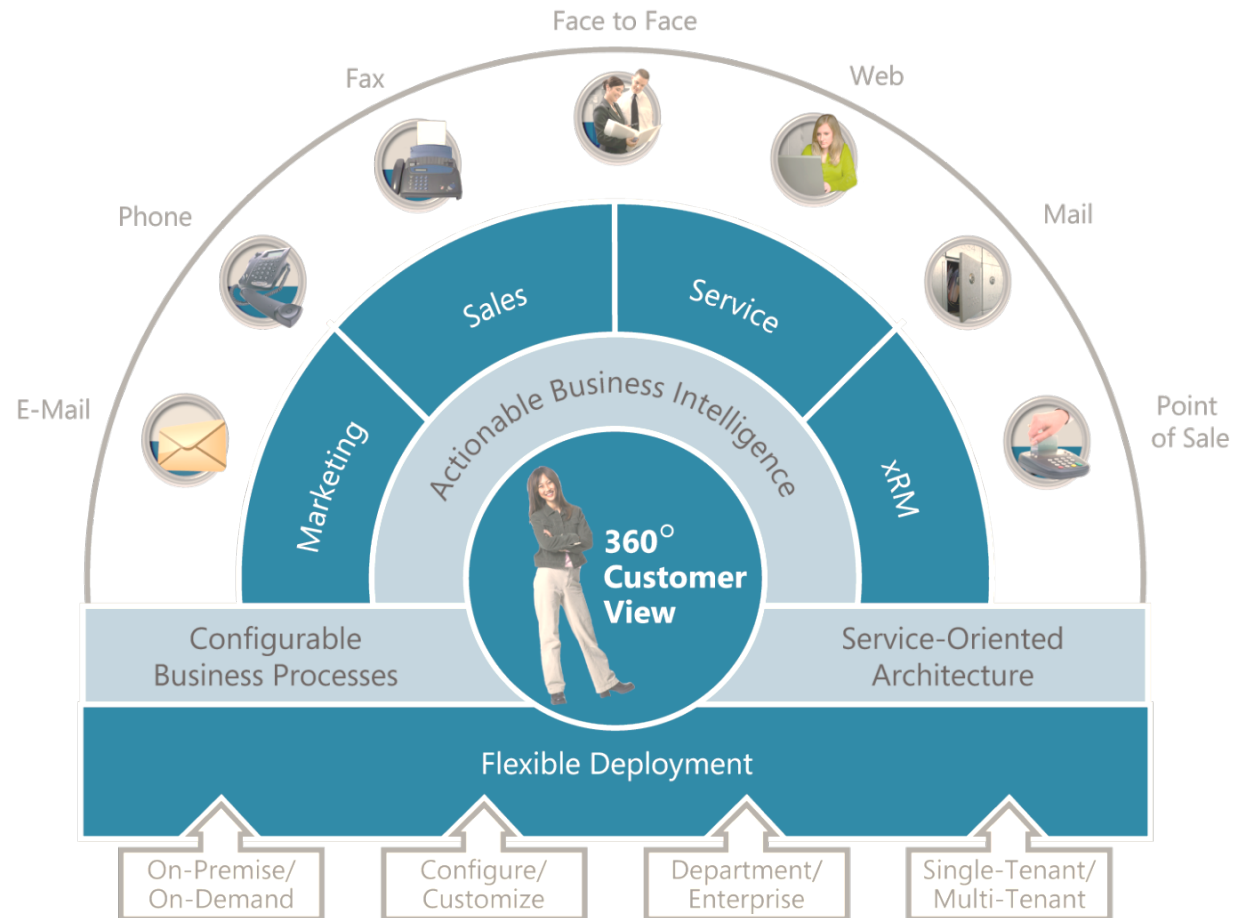
Rich Platform

- 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

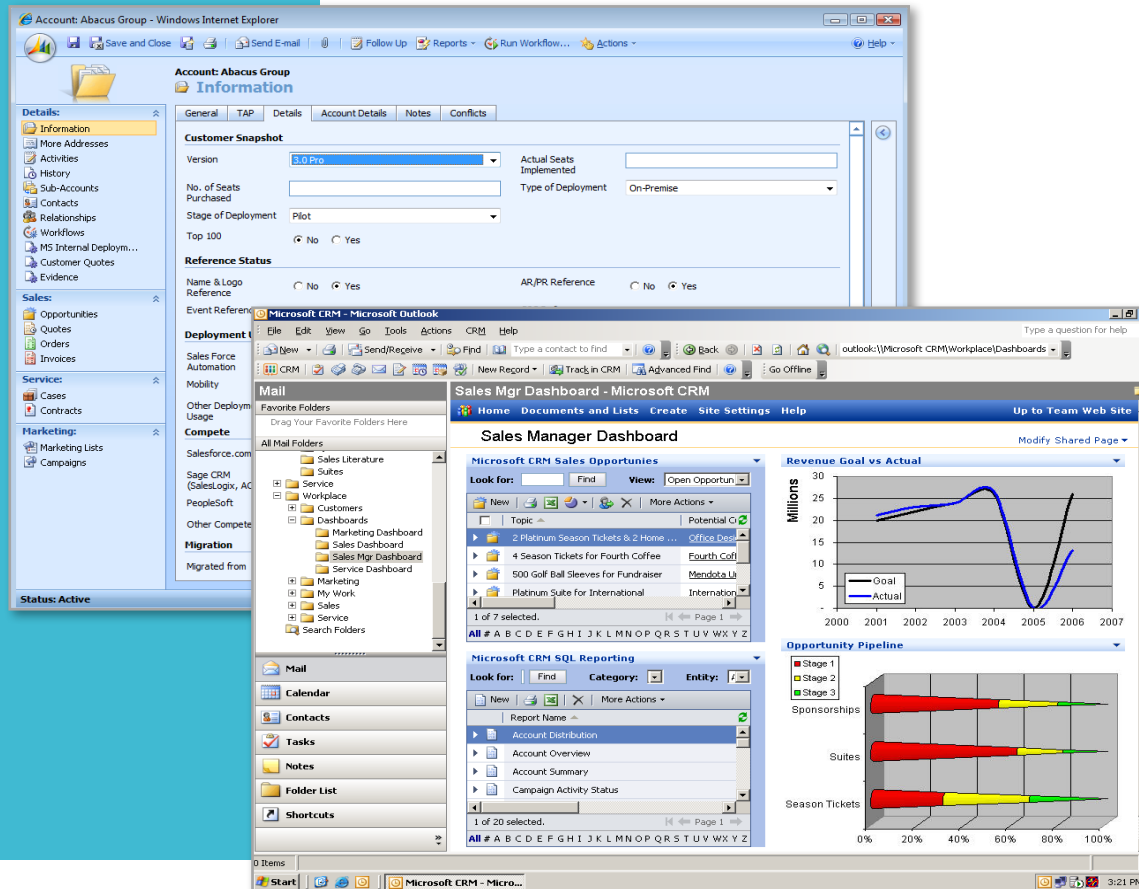
DEPLOYMENT

- 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

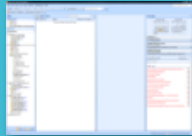
Surround Deployments

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

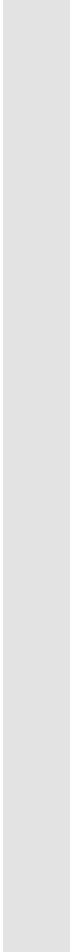
- Single code base across on-premise, on-demand, hybrid
- Host it internally for ultimate flexibility and control

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
- 

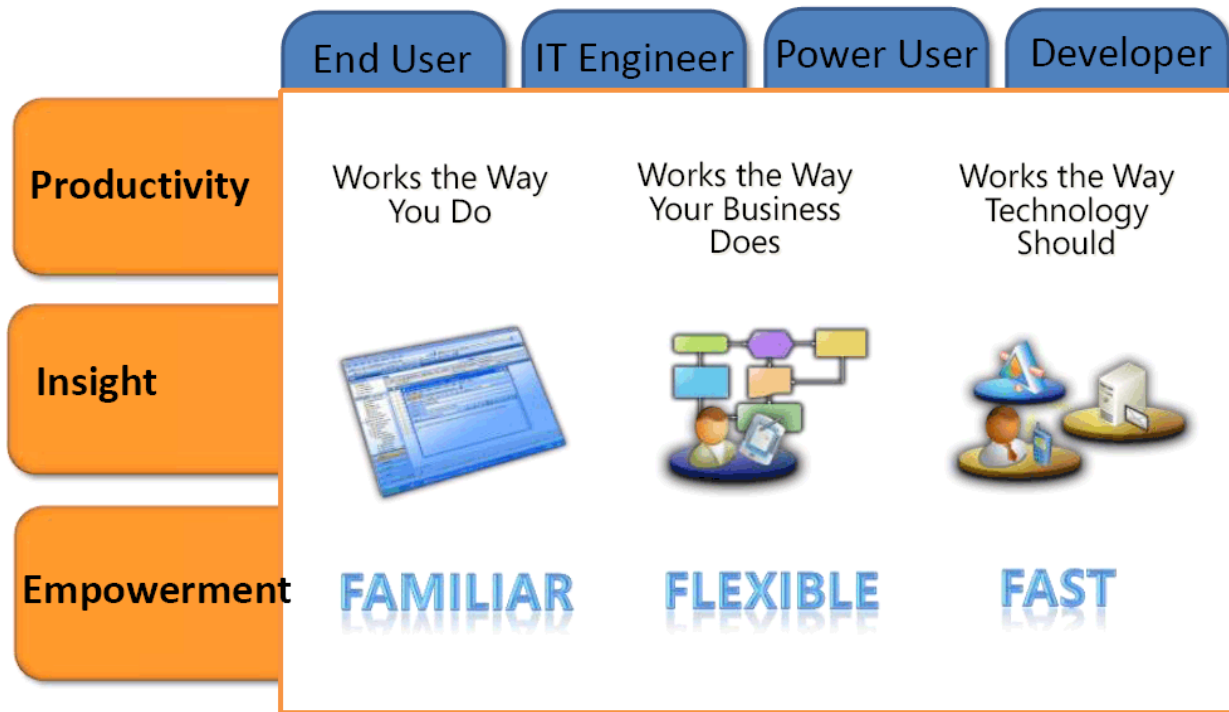
What is Microsoft CRM?

“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

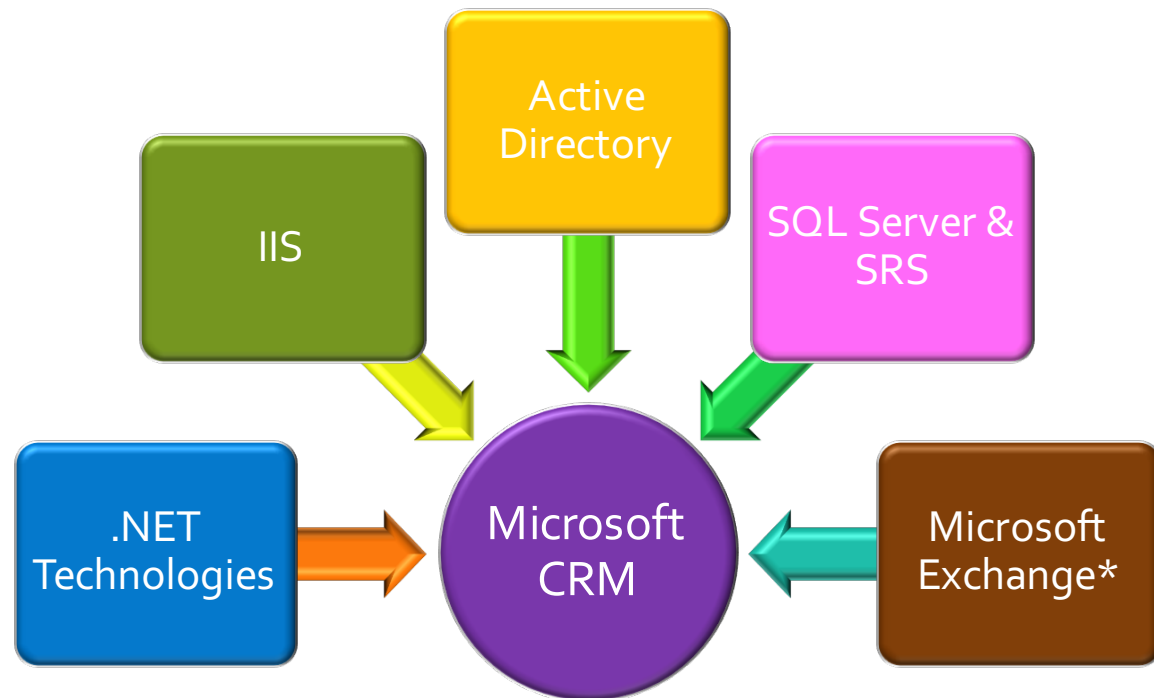
* Microsoft Dynamics CRM 4.0 code named Titan

Delivers value for all

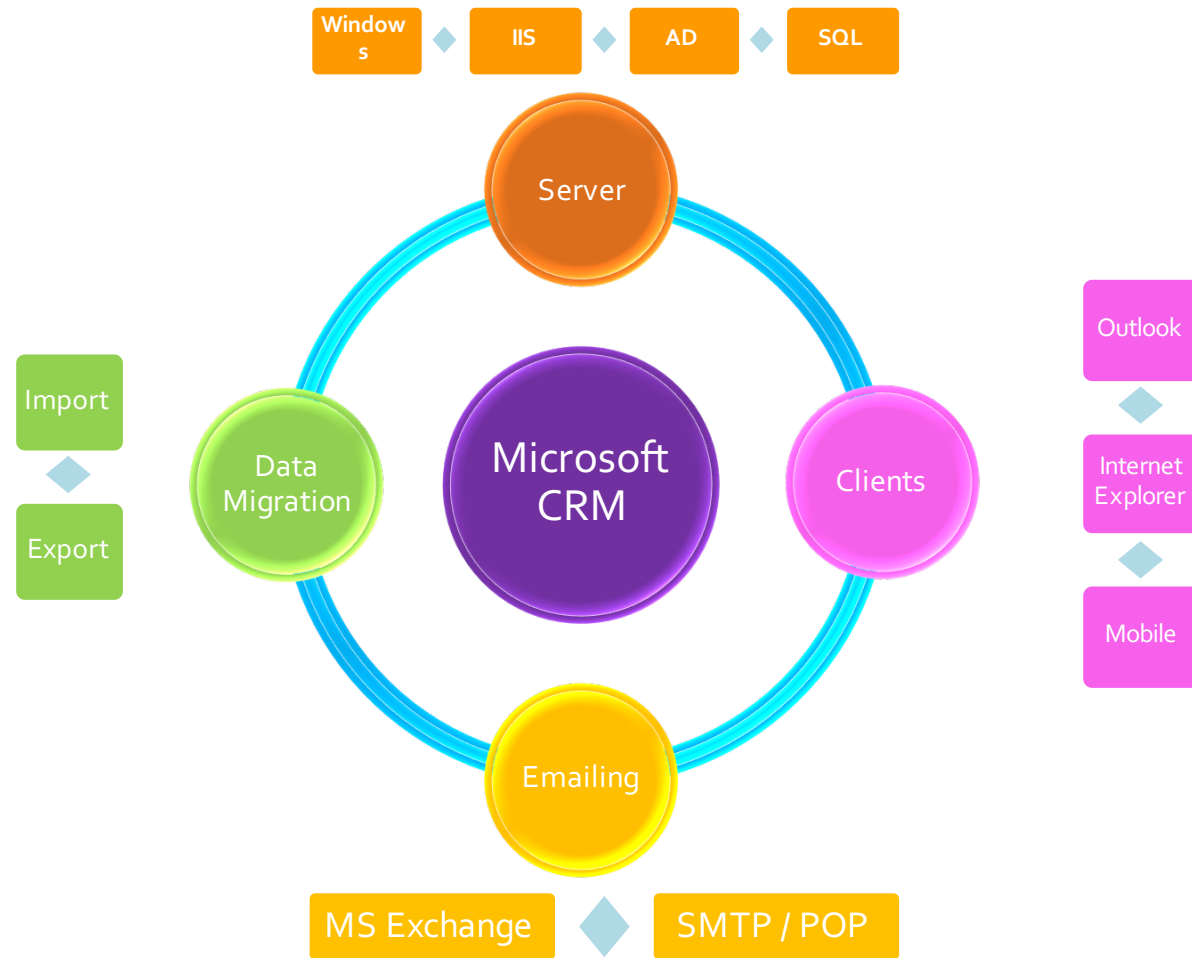


The Technologies

Microsoft CRM integrates and works with the following technologies



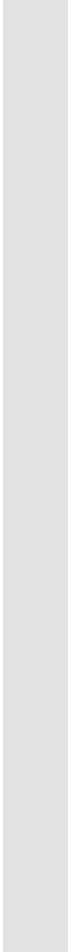
The components





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

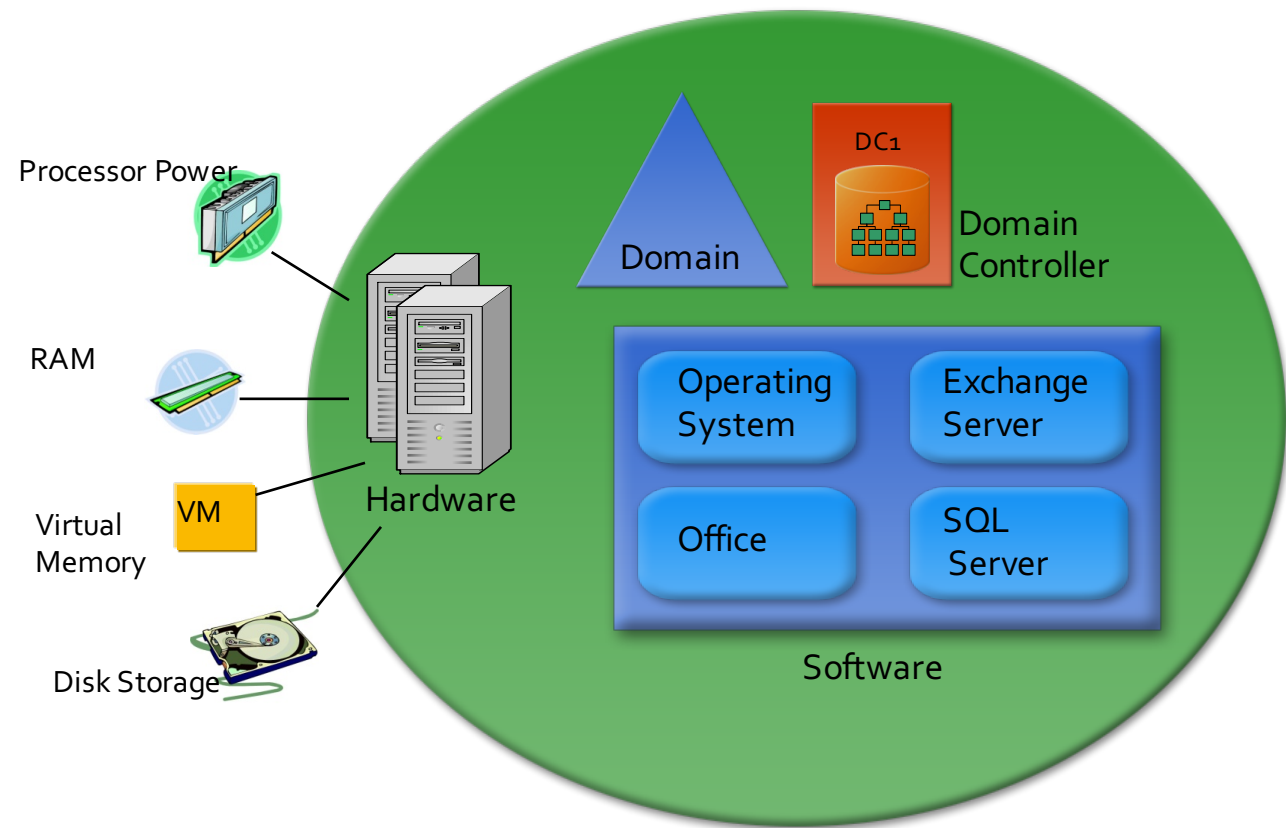
Plan for the future when purchasing Hardware

Planning your deployment - Software

Verify current software components:

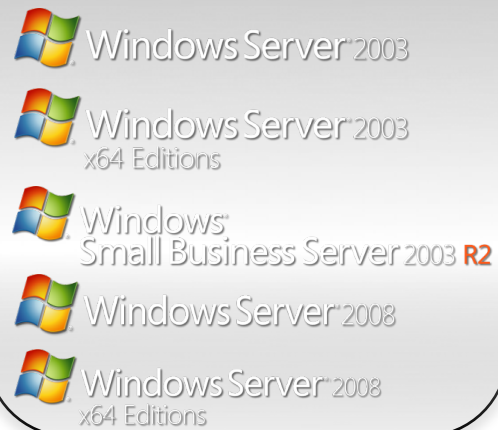
- Microsoft Dynamics CRM Server
- Microsoft Dynamics CRM Web Browser client
- Microsoft Dynamics CRM for Office Outlook
- Microsoft Dynamics CRM E-mail Router

Planning Your Deployment – Complete Picture



Server Support

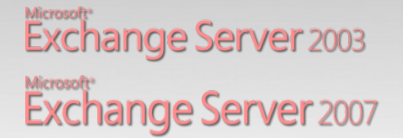
Windows Server



SQL Server



Exchange



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

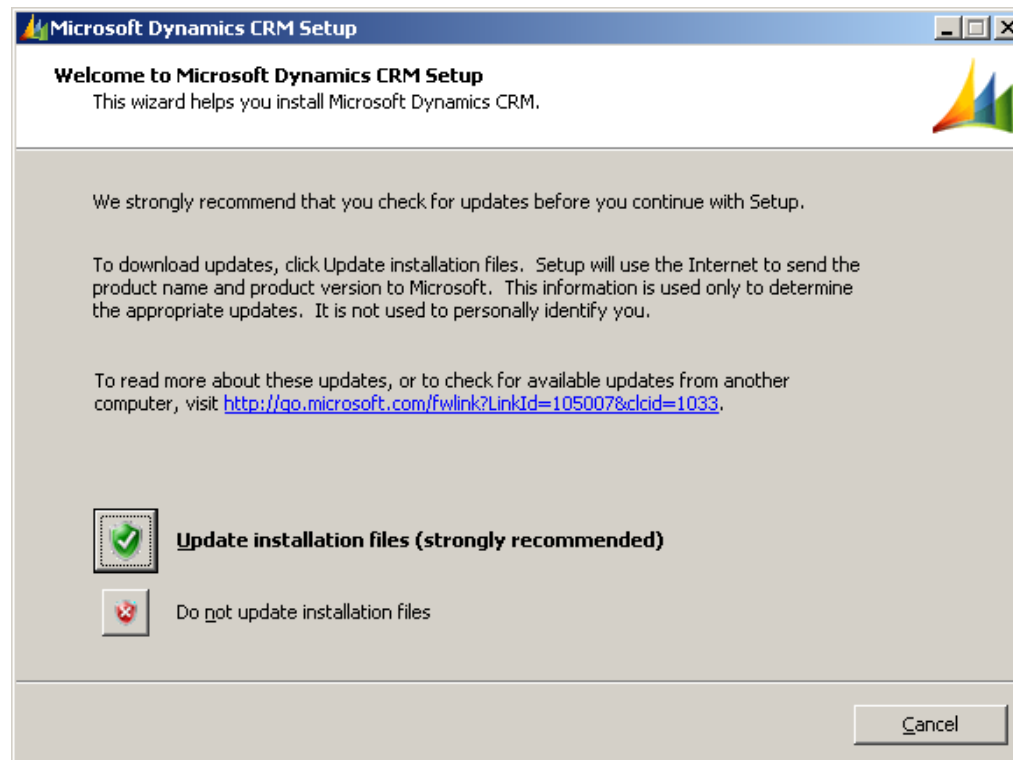
- Install from source media with GUI wizard
- Scriptable via command-line arguments and an installation XML file
- Supports both repairing an installation and uninstalling it
- Uninstalling CRM does not remove the databases
- Performs pre-requisite checks
- Includes the Environment Diagnostic Wizard (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

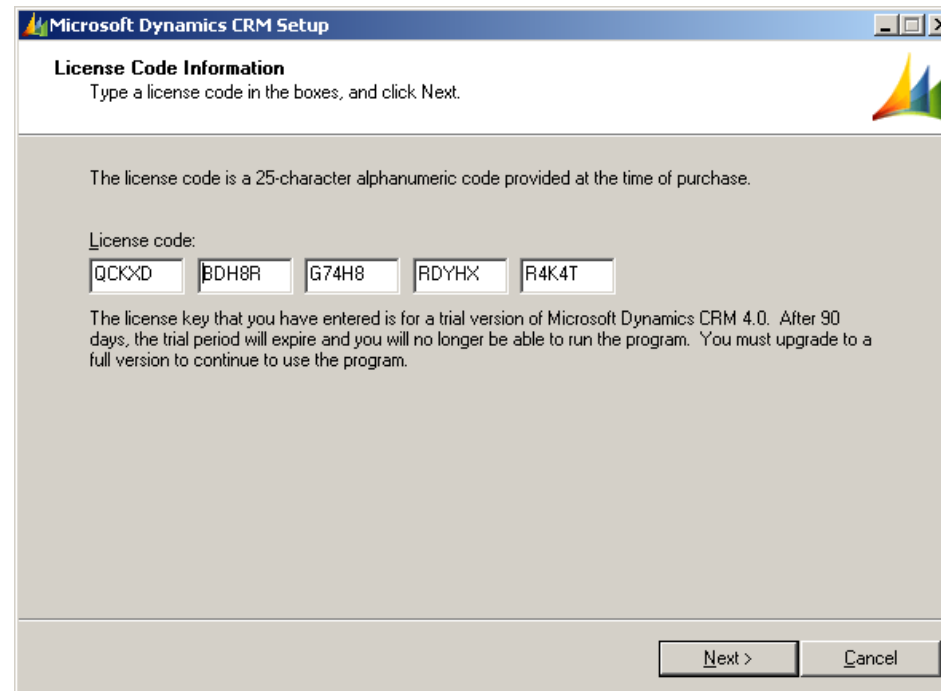
Directly from the installation disk or from installation source on the hard drive



Update setup package



Product Key



The image shows a Windows-style dialog box titled "Microsoft Dynamics CRM Setup". The main heading is "License Code Information", followed by the instruction "Type a license code in the boxes, and click Next." A small Microsoft Dynamics CRM logo is in the top right corner. The text explains that the license code is a 25-character alphanumeric code. Below this, the label "License code:" is followed by five input boxes containing the characters "QCKXD", "BDH8R", "G74H8", "RDYHX", and "R4K4T". A paragraph below states that this is a trial version of Microsoft Dynamics CRM 4.0, which expires after 90 days. At the bottom right, there are "Next >" and "Cancel" buttons.

Microsoft Dynamics CRM Setup

License Code Information
Type a license code in the boxes, and click Next.

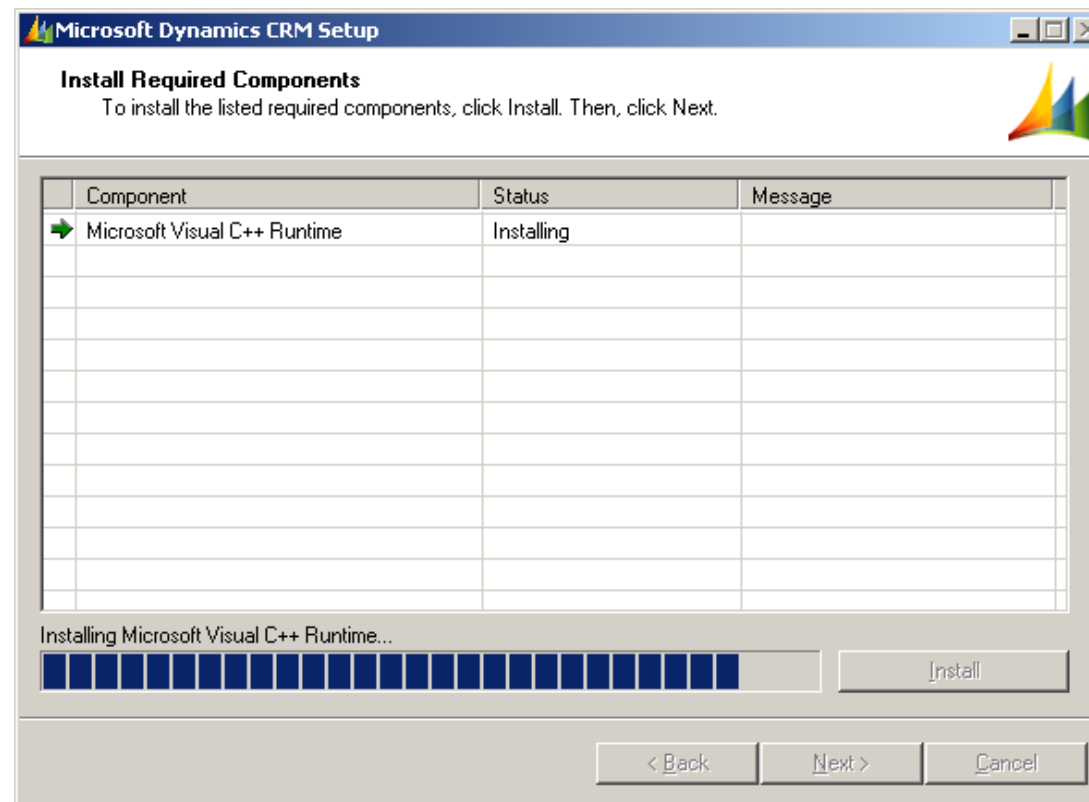
The license code is a 25-character alphanumeric code provided at the time of purchase.

License code:

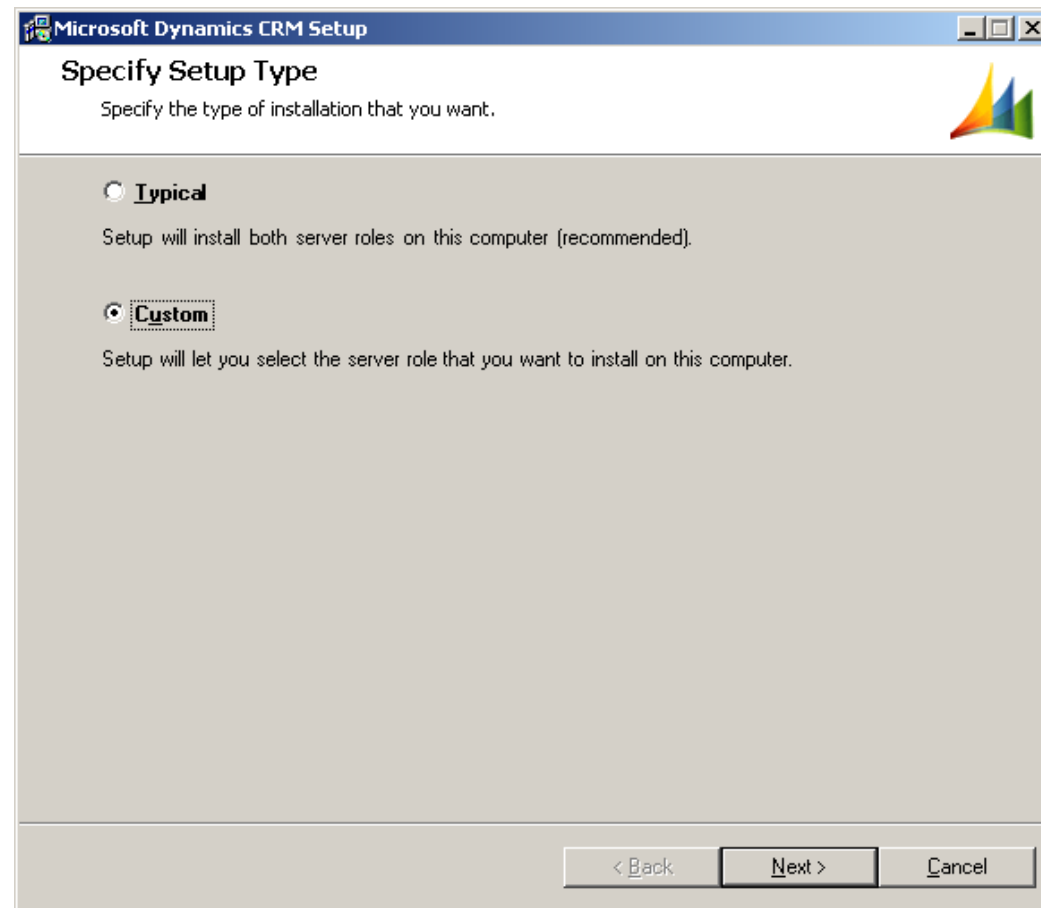
QCKXD BDH8R G74H8 RDYHX R4K4T

The license key that you have entered is for a trial version of Microsoft Dynamics CRM 4.0. After 90 days, the trial period will expire and you will no longer be able to run the program. You must upgrade to a full version to continue to use the program.

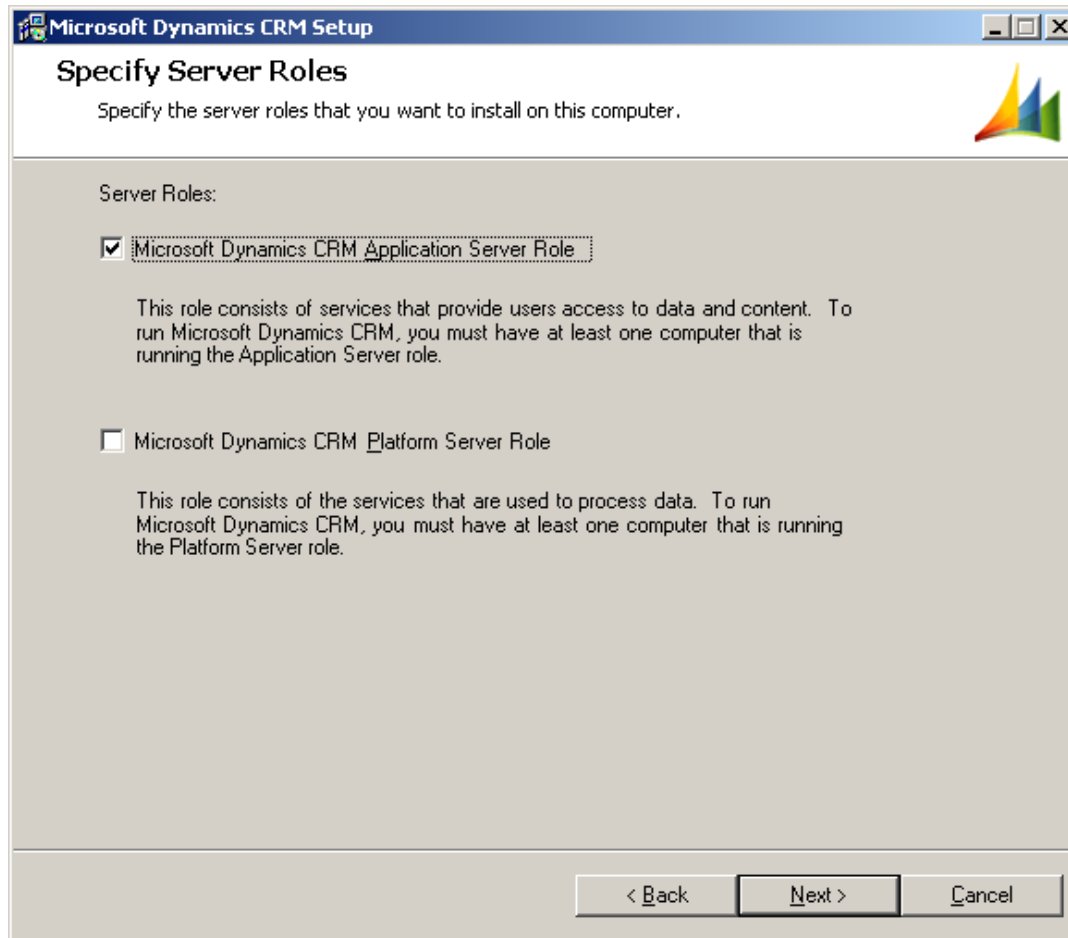
Next > Cancel



Type of installation



Server Role



SQL Server

Microsoft Dynamics CRM Setup

Specify Deployment Options


Specify the Microsoft Dynamics CRM 4.0 deployment and SQL Server computer to use for this installation.

Create or connect to a deployment:

☒ Create a new deployment

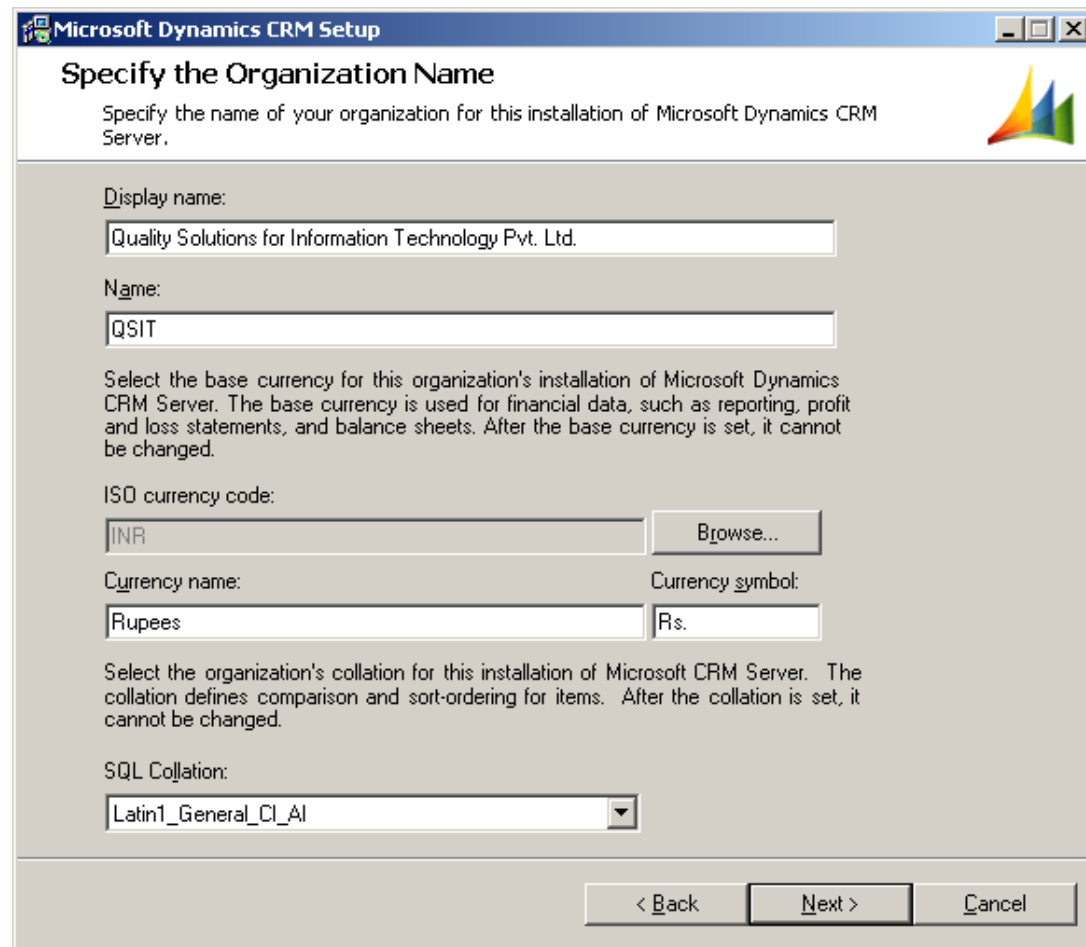
☐ Connect to an existing deployment

Enter or select the name of the computer that is running SQL Server to use with the deployment:



< Back Next > Cancel

Organization & Currency information



Microsoft Dynamics CRM Setup

Specify the Organization Name

Specify the name of your organization for this installation of Microsoft Dynamics CRM Server.

Display name:
Quality Solutions for Information Technology Pvt. Ltd.

Name:
QSIT

Select the base currency for this organization's installation of Microsoft Dynamics CRM Server. The base currency is used for financial data, such as reporting, profit and loss statements, and balance sheets. After the base currency is set, it cannot be changed.

ISD currency code:
INR Browse...

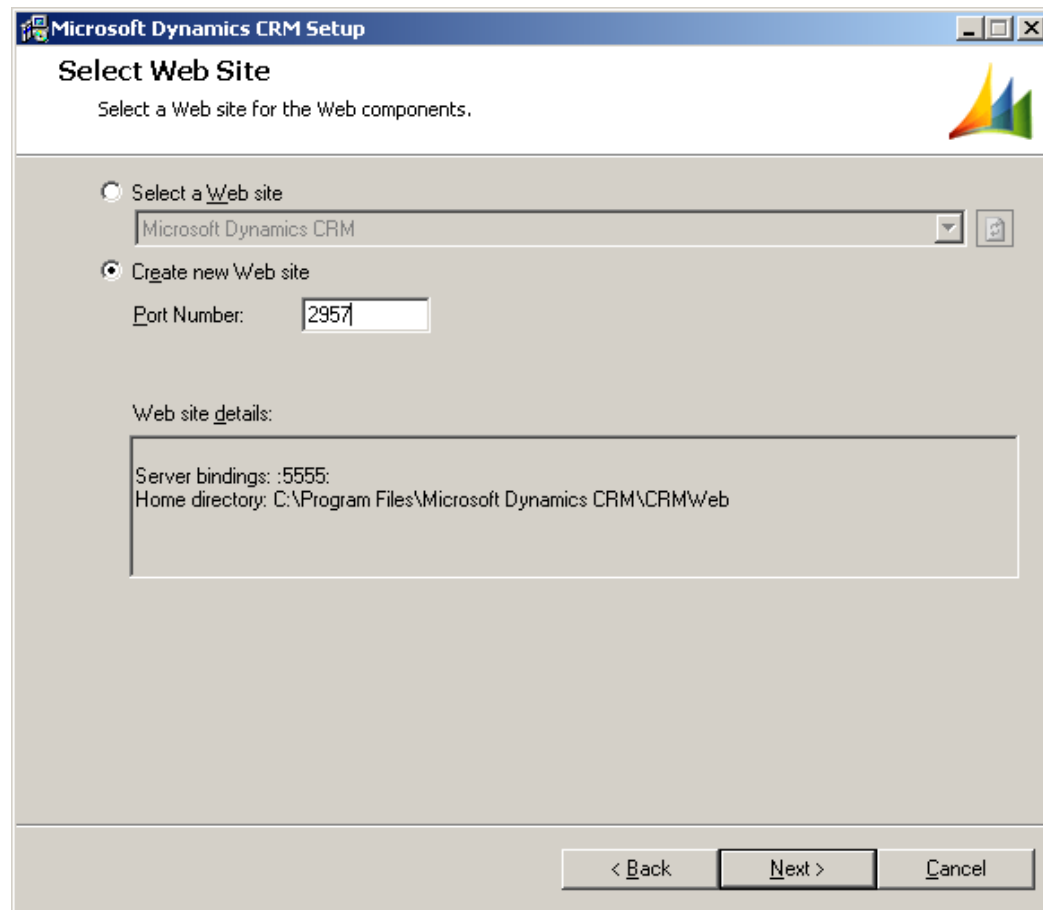
Currency name: Rupees Currency symbol: Rs.

Select the organization's collation for this installation of Microsoft CRM Server. The collation defines comparison and sort-ordering for items. After the collation is set, it cannot be changed.

SQL Collation:
Latin1_General_CI_AI

< Back Next > Cancel

IIS Configuration



The screenshot shows the 'Microsoft Dynamics CRM Setup' window with the 'Select Web Site' tab selected. The window title bar includes the Microsoft Dynamics CRM logo and the text 'Microsoft Dynamics CRM Setup'. The main heading is 'Select Web Site' with the instruction 'Select a Web site for the Web components.' and a small Dynamics CRM logo. There are two radio button options: 'Select a Web site' (unselected) and 'Create new Web site' (selected). The 'Select a Web site' option has a text box containing 'Microsoft Dynamics CRM' and two small icons (a folder and a document). The 'Create new Web site' option has a 'Port Number' label and a text box containing '2957'. Below these options is a section titled 'Web site details:' containing a text box with the following information: 'Server bindings: :5555;' and 'Home directory: C:\Program Files\Microsoft Dynamics CRM\CRM\Web'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

Microsoft Dynamics CRM Setup

Select Web Site

Select a Web site for the Web components.

☐ Select a Web site

Microsoft Dynamics CRM

☒ Create new Web site

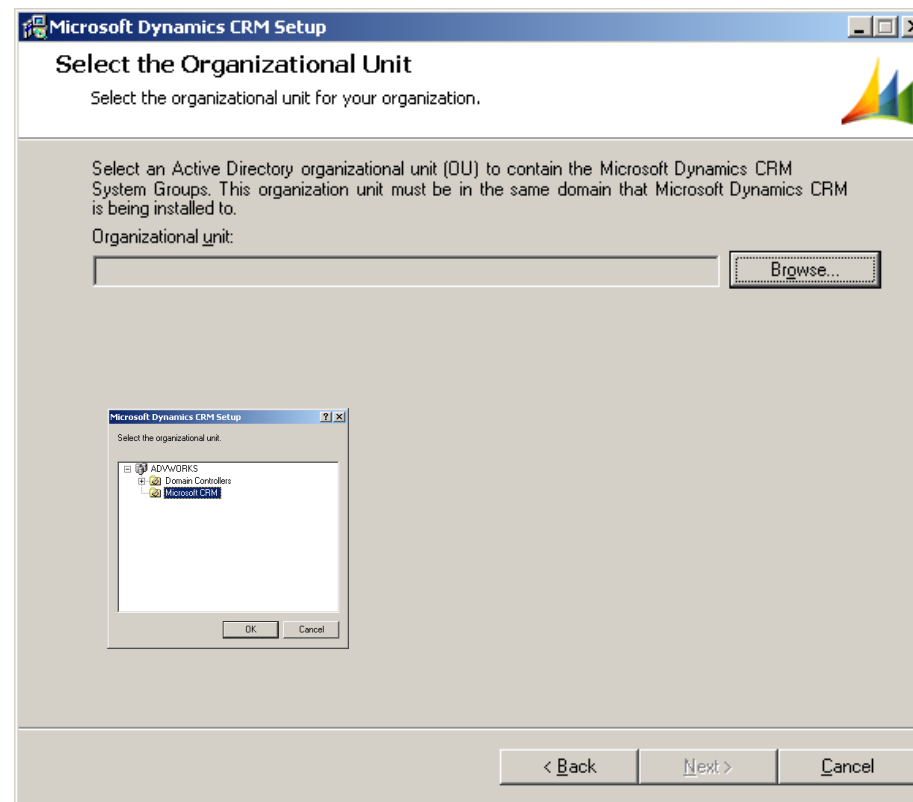
Port Number: 2957

Web site details:

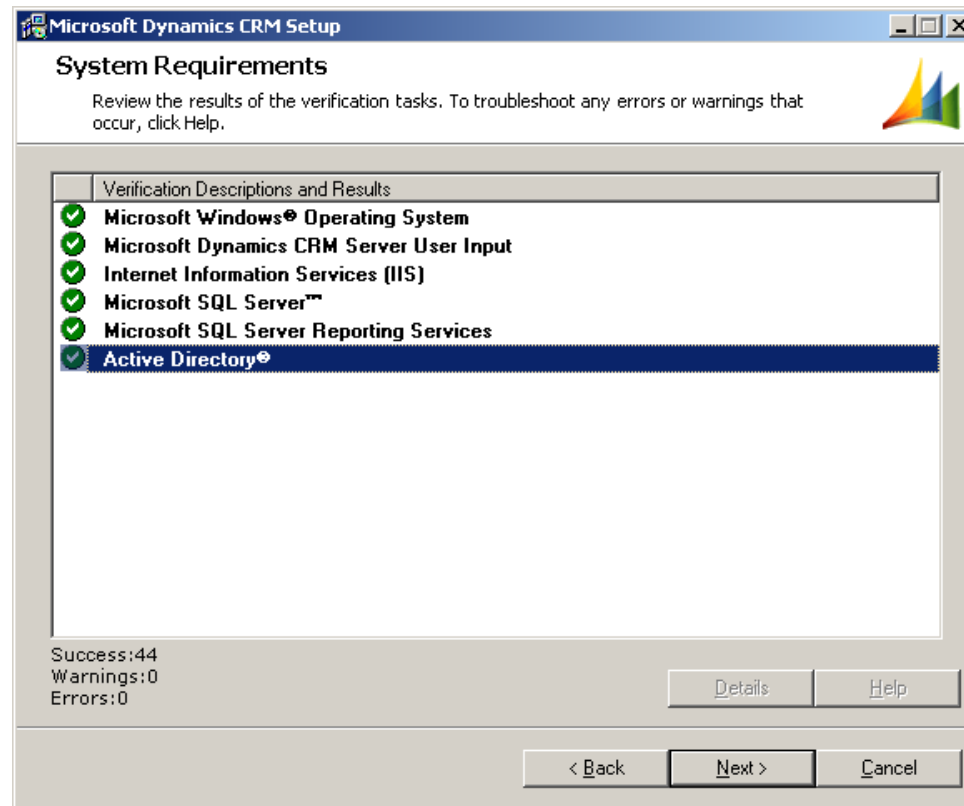
Server bindings: :5555;
Home directory: C:\Program Files\Microsoft Dynamics CRM\CRM\Web

< Back Next > Cancel

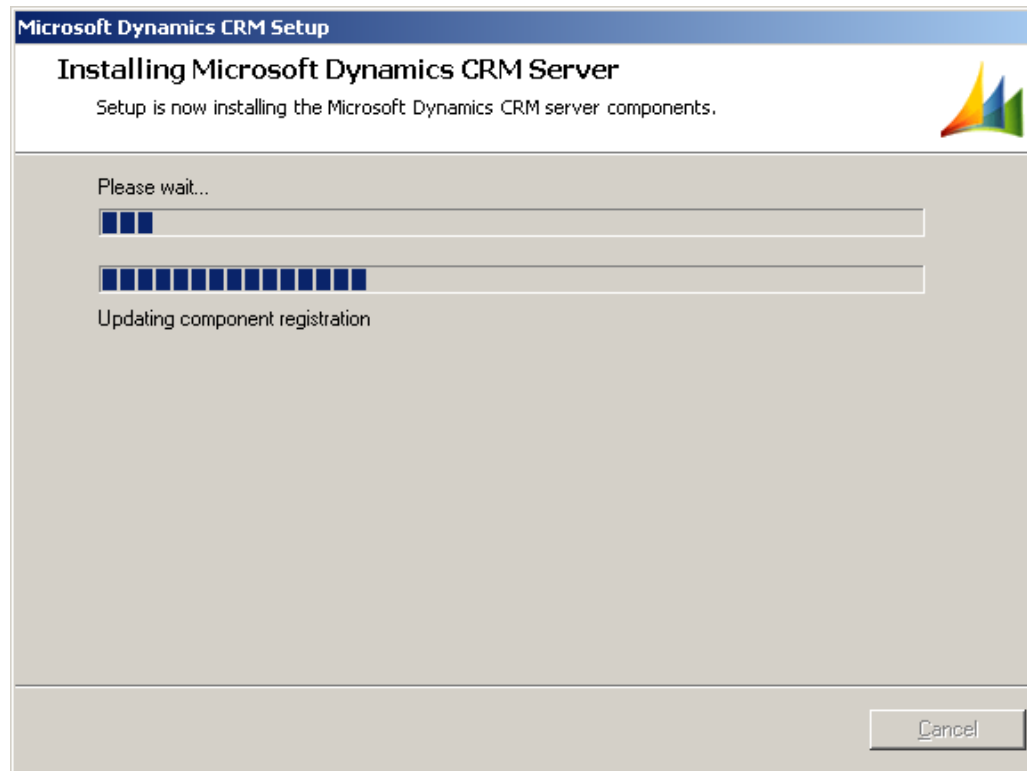
Active Directory



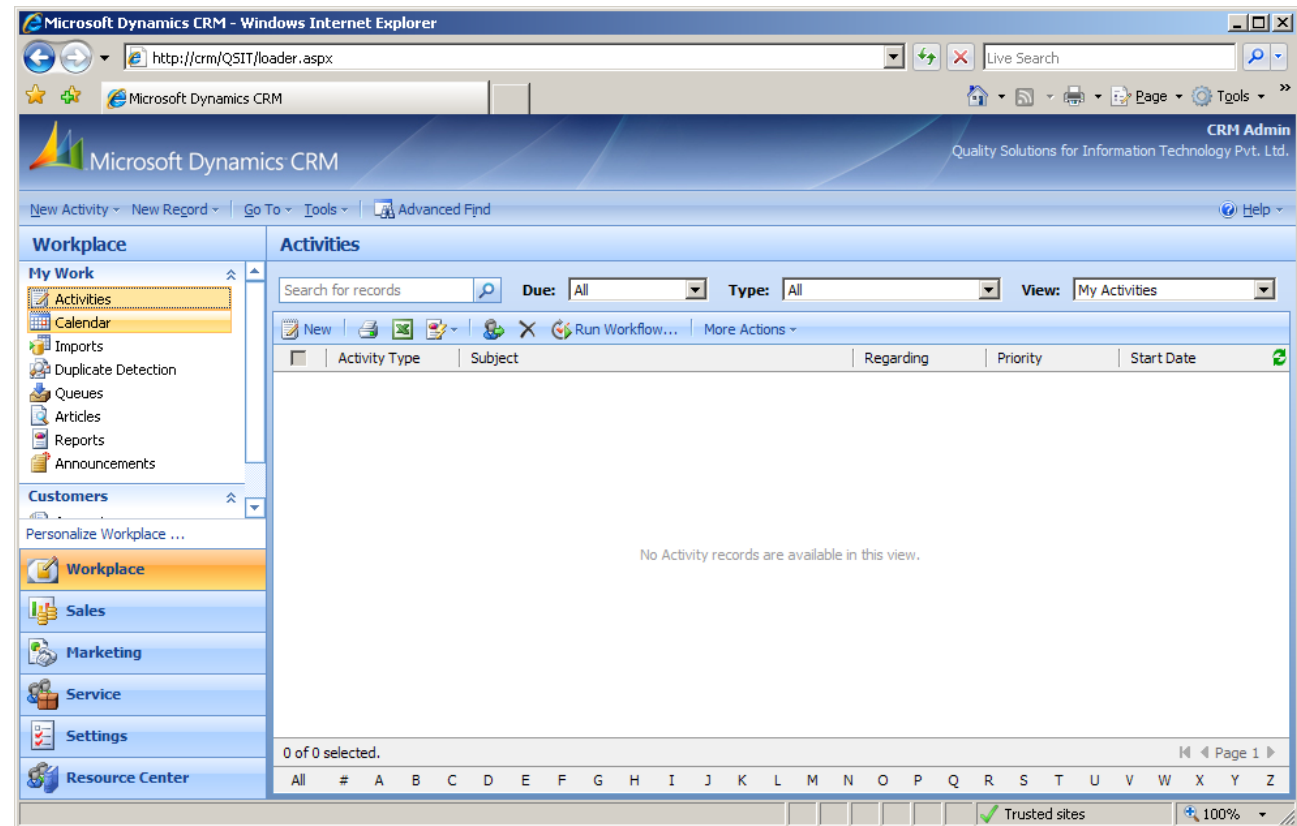
Environment Diagnostics Wizard



The installation



The Installed product





Deployment Options

Choose how:

Outlook, browser,
mobile

Choose what:

Software or service

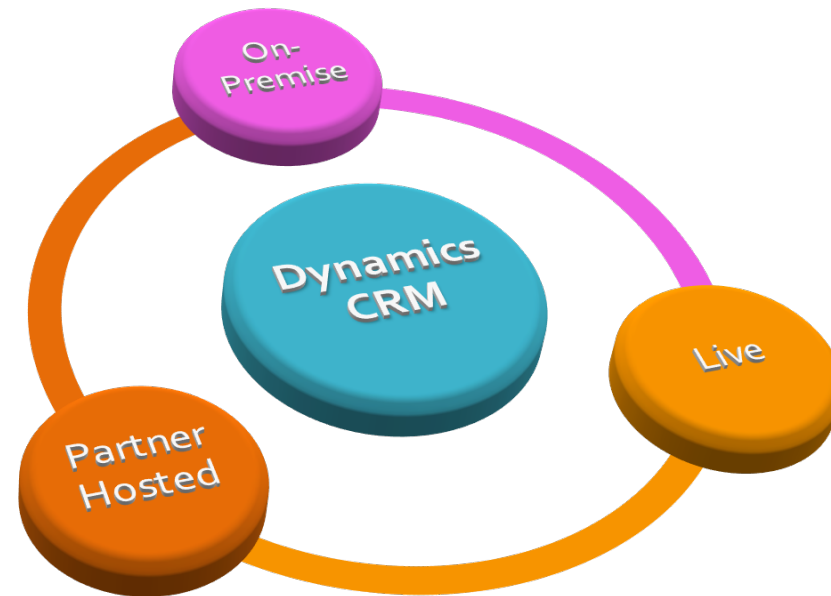
Choose where:

Own it or rent it

Change your mind
any time

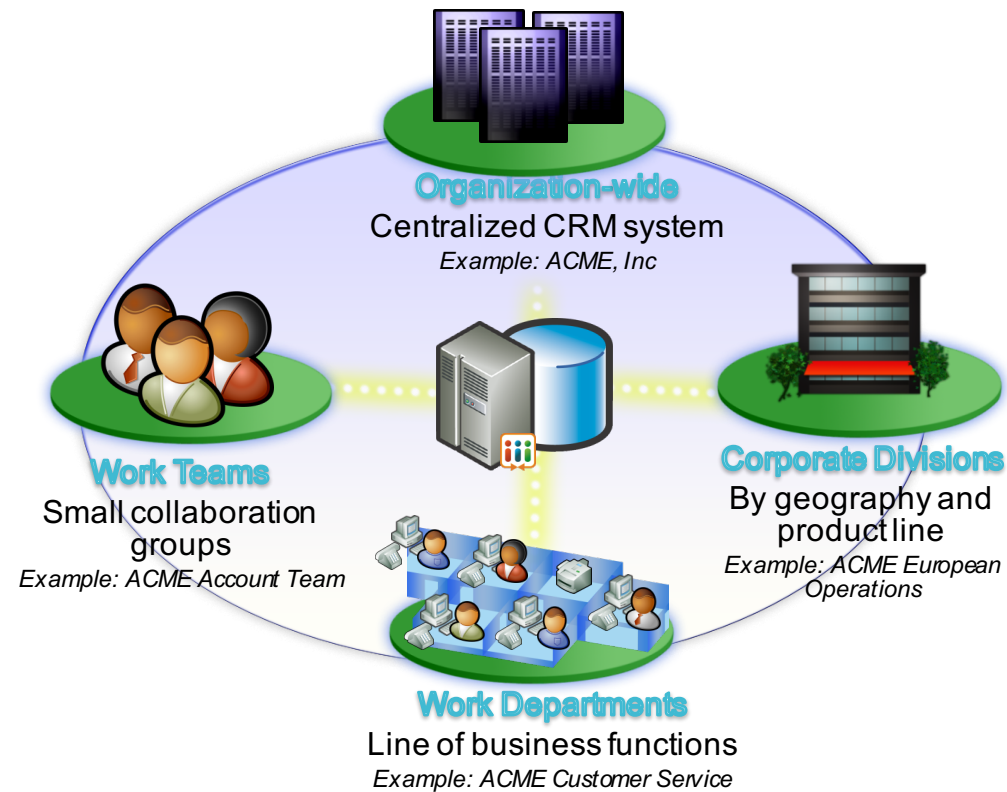
Shared code-based
across versions, written
with internet facing
deployments in mind.

Deployment Options: The Power of Choice



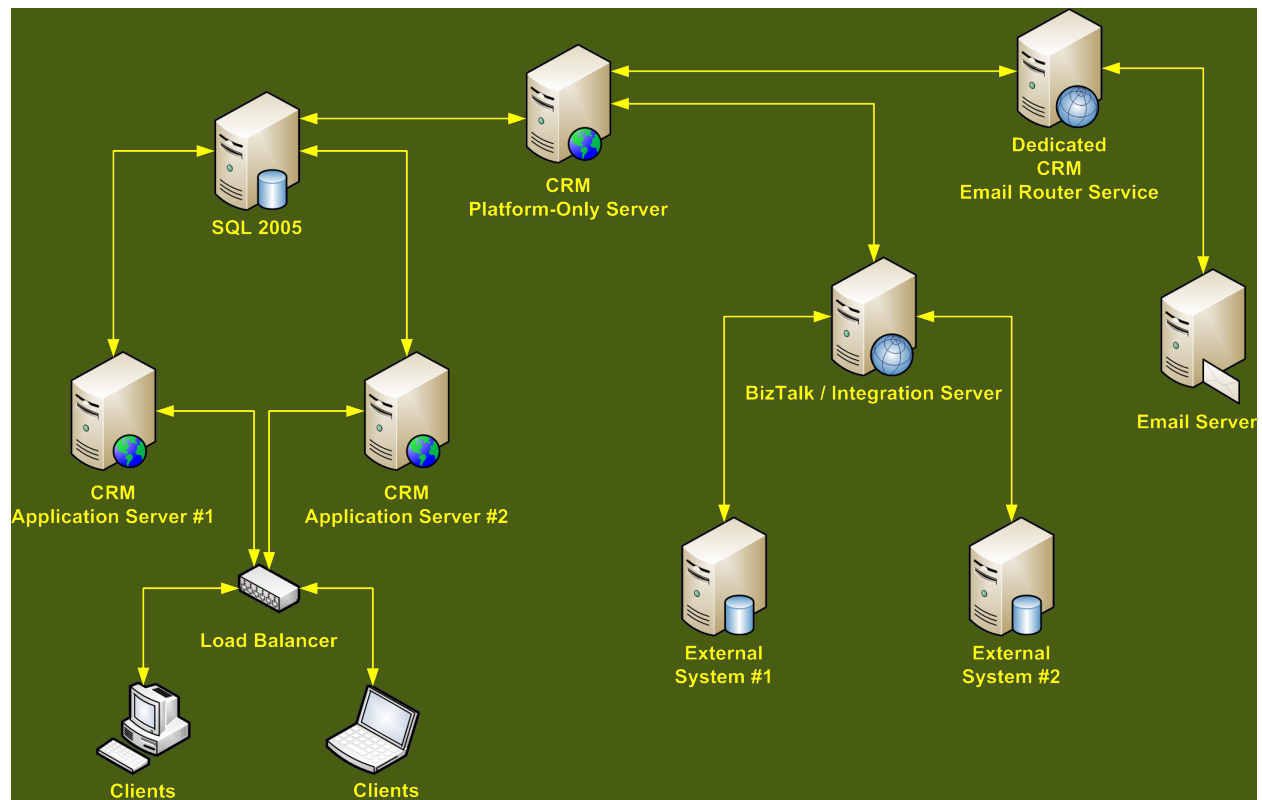
Deployment Choice
Enhanced Architecture
Internet-scale performance
Enhanced application & platform customization
Data lifecycle management

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.

The screenshot shows the 'Microsoft Dynamics CRM Internet Facing Deployment Configuration Tool' window. It has a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The 'Authentication Settings' section includes 'Authentication Strategy' set to 'IFD+On Premise', 'Anonymous' set to 'ON', and 'Key Encryption' set to 'ON'. Below this is the 'IFD Internal Network Address and Subnet Mask' section with a text box containing '165.220.30.1-255.255.254.0'. The 'IFD Domain Scheme' is set to 'HTTP', and the 'IFD App Root Domain' and 'IFD SDK Root Domain' are both set to 'domain.com'. The 'AD Domain Scheme' is set to 'HTTP', and the 'AD App Root Domain' and 'AD SDK Root Domain' are both set to 'crmserver:5555'. There are also fields for 'AD Domain Scheme', 'AD App Root Domain', and 'AD SDK Root Domain' with values 'HTTP', 'crmserver:5555', and 'crmserver:5555' respectively. The bottom section shows 'IFD Domain Scheme' set to 'HTTP', 'IFD App Root Domain' set to 'domain.com', and 'IFD SDK Root Domain' set to 'domain.com'.

The screenshot shows the 'Microsoft Dynamics CRM' Sign In page. It has a header with the Microsoft Dynamics CRM logo. The main content area is titled 'Sign In' and contains a 'User name:' field, a 'Password:' field, and a 'Sign in' button. Below the sign in button, there is a link that says 'Forget your password? Contact your Microsoft Dynamics CRM administrator.' The bottom of the page has a footer with the text '© 2009 Microsoft Corporation. All rights reserved. Microsoft, the Microsoft Dynamics logo, and the Microsoft Dynamics CRM logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.'



Client Setup

Installing the Outlook client



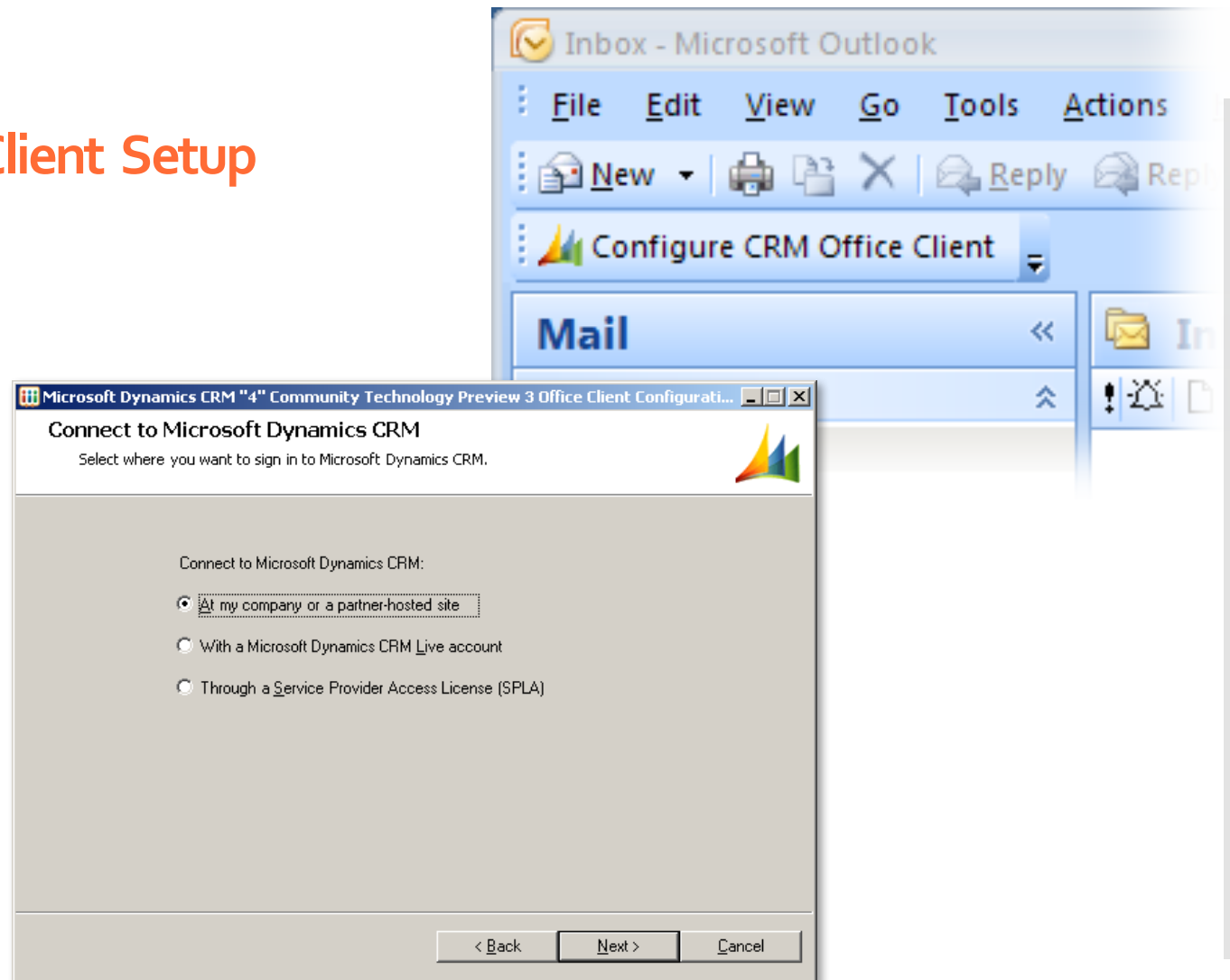
Client Setup

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



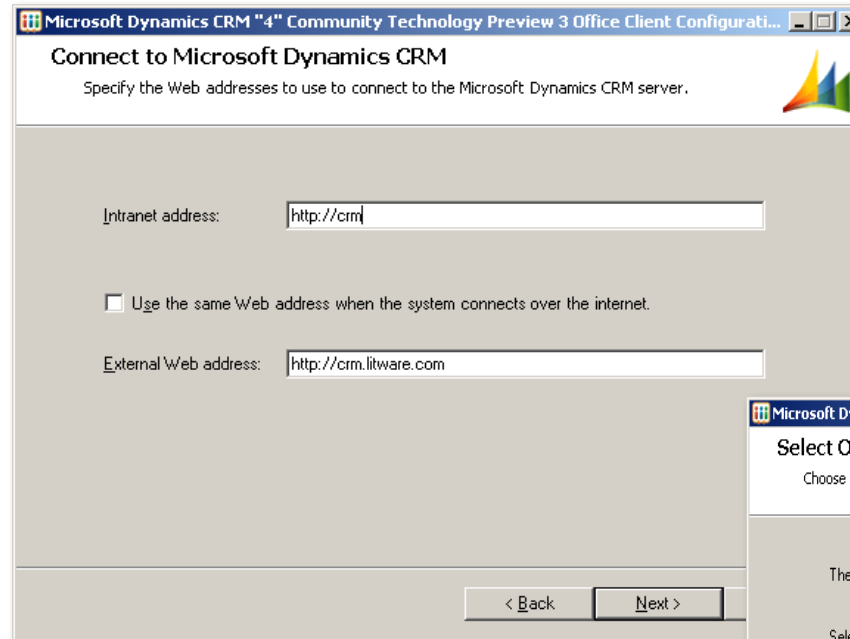
“Internal” and “External”
connection
URLs

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.

Client configuration



Microsoft Dynamics CRM "4" Community Technology Preview 3 Office Client Configurati...

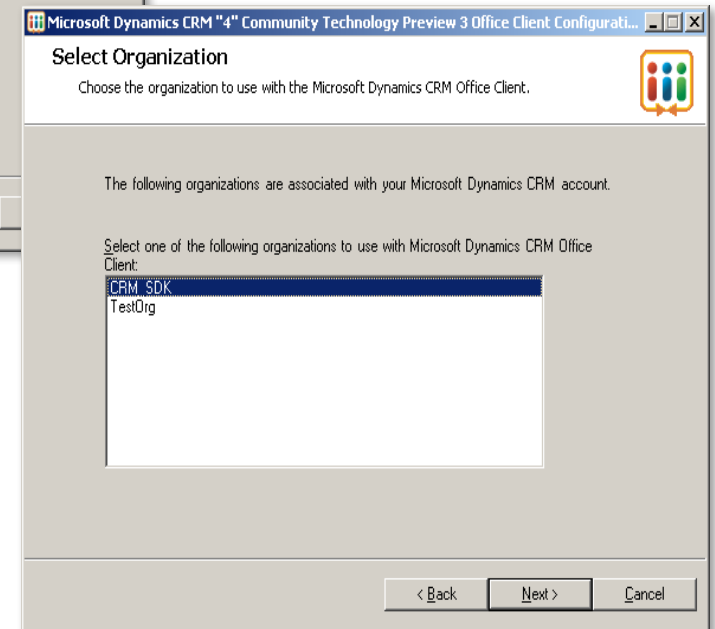
Connect to Microsoft Dynamics CRM
Specify the Web addresses to use to connect to the Microsoft Dynamics CRM server.

Intranet address:

☐ Use the same Web address when the system connects over the internet.

External Web address:

< Back Next >



Microsoft Dynamics CRM "4" Community Technology Preview 3 Office Client Configurati...

Select Organization
Choose the organization to use with the Microsoft Dynamics CRM Office Client.

The following organizations are associated with your Microsoft Dynamics CRM account.

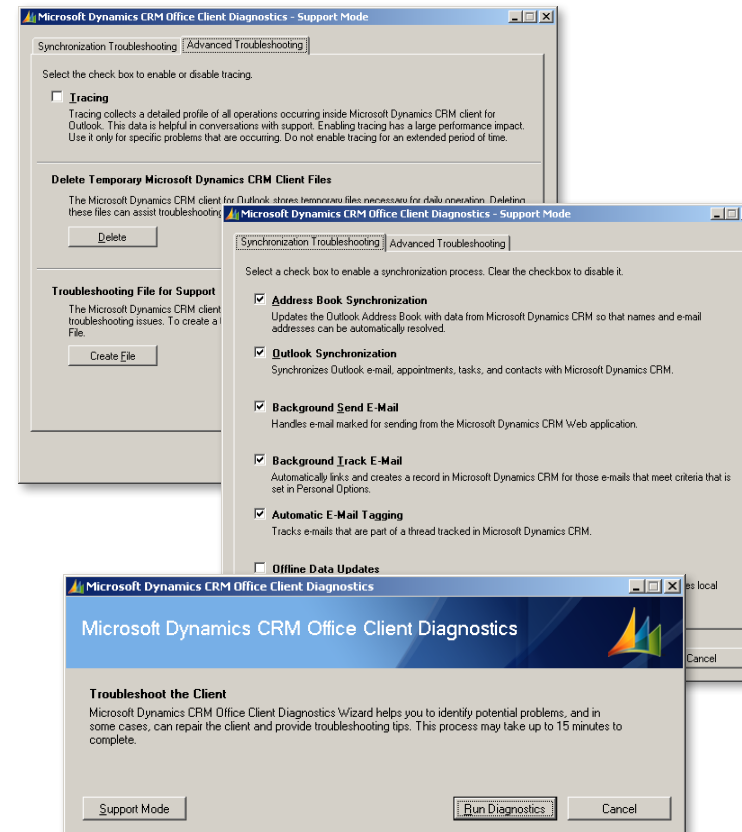
Select one of the following organizations to use with Microsoft Dynamics CRM Office Client:

CRM_SDK
TestOrg

< Back Next > Cancel

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.

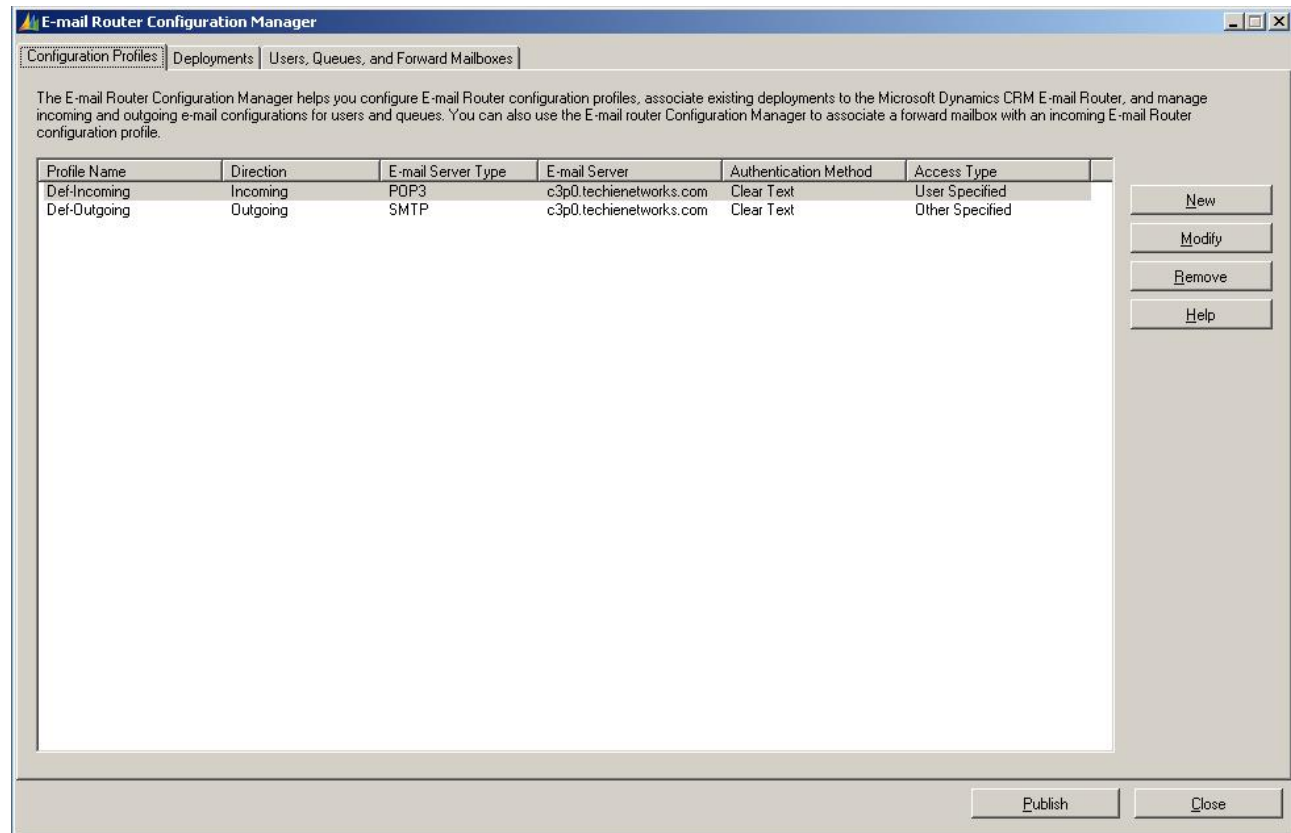
The Microsoft Dynamics CRM E-mail Router is a software component that provides an interface between:

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...