How to Prepare for the Microsoft Dynamics CRM Online Fall ’13 Service Update

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Microsoft Dynamics CRM

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Overview

Microsoft Dynamics CRM Online Fall ’13 is focused on delivering a business application that delights users through experiences that are modern, seamless and device-optimized.

This document is intended to give you an overview of what to expect during the update to Microsoft Dynamics CRM Online Fall ’13.

Before The Update: What You Need to Know

Support changes for software and OS components

Microsoft Dynamics CRM Online Fall ’13 takes advantage of more current capabilities provided by today’s browsers and server platforms. To do this, it requires a number of changes to the software and platforms in use.

Support is being removed for:

- Windows XP, to run either Microsoft Dynamics CRM for Outlook or the web application
- Microsoft Office 2003
- E-mail Router will no longer support:
    - Microsoft Exchange Server 2003 for email routing and tracking
    - Microsoft Exchange Server 2007 WebDAV protocol for email routing and tracking. Microsoft Exchange Server 2007 Exchange Web Services (EWS) will still be supported

Support is being added for:

- Microsoft Exchange Server 2013
- Microsoft Outlook 2013
- Active Directory Federation Services (AD FS) 2.2 (ships with Windows Server 2012 R2)

These changes are documented in the Microsoft Dynamics CRM 2011 Implementation Planning Guide: What’s Changing topic.

Customer-driven update

Companies that use cloud-based technologies have the advantage of having the latest technology available for their business applications. With this rapid cadence, some organizations need the flexibility to plan their update so that they can prepare their systems and train their users. With Microsoft Dynamics CRM Online Fall ’13, we are notifying you of your scheduled update date while providing you the flexibility to schedule when you receive these updates, if you so desire. Administrators will receive in-product and email notifications of their update schedule, which includes instructions to reschedule the update, if necessary. Email reminders are sent 90, 30, 15, and 7 days before the update begins. A primary and secondary timeslot for update will be allocated for all organizations.

Note: The service update will happen during a 12-hour window. During that time your organization might be unavailable for several hours. We’ll let you know when your organization is updated and ready to use.

What to expect

Communications

If you currently have a CRM online environment (trials are excluded from update), you should have already received the first of several notifications that you will receive as your update date approaches.

We provide notifications through multiple channels, such as:

- **On the Web.** This notification appears inside the CRM application as a pop-up message. It will also appear when your organization is being updated.
- **In CRM alert.** This notification appears on the message bar in CRM.
- **By email.** These are alerts that go directly to the email account registered for the CRM administrator for your organization.

In general, the notifications occur in the following order:

Notification Type	On Web	In CRM Alert	By Email
Update scheduled	YES	YES	YES
90 days before update	NO	NO	YES
30 days before update	NO	NO	YES
15 days before update	NO	NO	YES
7 days before update	NO	YES	YES
Update in progress	YES	NO	NO
Updated successfully	NO	NO	YES
Fallback to secondary update slot	NO	NO	YES
Update will be rescheduled	NO	NO	YES

What to do if you are unable to update as scheduled?

Rescheduling

If you need to reschedule the update for your organization, you can do that at any time directly inside CRM. To reschedule the update, navigate to the **Settings** > **Administration** area of CRM, and then select **Resources in use** from the components list.

This will display the current use of your CRM environment. At the top of this screen you will see an area titled **Your update to CRM Online Fall '13 is now scheduled**. In this area, click **Reschedule update** to pick a new primary and secondary date.

Prepare your CRM organization for the update

Microsoft Dynamics CRM Online Fall '13 contains a number of exciting changes. To take advantage of new features, you need to ensure any customizations are compatible with this update.

Legacy features that are no longer supported

With the launch of CRM Online Fall '13, we are officially dropping support for legacy CRM 4.0 features. These features were deprecated with CRM 2011 and will no longer work with this new update.

Dynamics CRM 4.0 features that will no longer be supported:

- CRM 4.0 plug-ins
- CRM 4.0 client-side scripting
- CRM 4.0 custom workflow activities
- CRM 4.0 web service API (also known as the 2007 web service endpoints)
- ISV Folder support for custom web applications

CRM 2011 SDK is tool no longer required

The Solution Downlevel tool, specifically built for the Microsoft Dynamics CRM December 2012 Service Update, should not be used anymore. Due to improvements to the solution framework, this tool is no longer needed.

Removal of CRM 4.0 client-side scripting

Microsoft Dynamics CRM 4.0 exposed global functions and form objects to form scripting with JavaScript. If you use any custom JavaScript within your current version of Microsoft Dynamics CRM, it is important to verify that this customized code does not disrupt a smooth update to the next version of CRM.

How to identify if you are using legacy features?

To assist you in this effort, we created a tool to help you identify and correct unsupported code prior to your update. Please download, install, and run the tool below on your Microsoft Dynamics CRM Online organization.

Microsoft Dynamics CRM 2013 Custom Code Validation Tool

The Custom Code Validation Tool will examine your web resources and show you where there might be some problems. The issues that are flagged are either using unsupported coding processes or using the CRM 4.0 objects and functions. Download this tool and extract the contents. Within the contents, you will find instructions about how to install and use the tool. For more information about this tool, read this blog: Check your JavaScript code to prepare for your upgrade

Checklist for the CRM Online update

Most of the update process is handled by Microsoft. However, there are a few things that you must do to prepare.

1. **Know when your update is scheduled.**
   You can see this in the **Settings** > **Administration** > **Resources** area.

2. **Involve your Microsoft Dynamics CRM Partner.**
   If you have a Microsoft Dynamics CRM partner of record, we strongly recommend that you contact them for guidance and assistance. If you do not have a partner, you may consult the Microsoft Dynamics Marketplace to identify a partner. Please note that there may be charges from partners for their services.

3. **Watch for communications from Microsoft.**
   We will send you several communications about this subject to keep you informed about the update.
   We are also displaying the notice to the users of your system in the CRM message bar.
   We also send email communications to users that have the System Administrator role in CRM. Please make sure the email accounts associated with those user accounts are valid and being monitored.
   Communications will come from crmoln@microsoft.com, or for partners, you will also receive communications from the Microsoft Dynamics CRM Partner Team: crmteam@microsoft.com.

4. **Verify your customizations are compatible.**
   You should take the time before your update to verify that customizations are compatible using the Microsoft Dynamics CRM 2013 Custom Code Validation Tool mentioned previously. You should do this early enough that you have time to fix any identified issues. Additionally, Microsoft will run a number of automated tests and if any of those tests fail in your instance, we will email the administrator a list of potential issues we have identified.

5. **Create a non-production instance to test your customizations in.**
   Ideally, you should test your customizations prior to update. This will also give you the opportunity to verify compatibility of any third-party customizations. If you identify any potential issues, please work with the solution provider to correct any issues that arise.

6. **Notify your users prior to the update of CRM.**
   It is a best practice to notify your users that the system will be unavailable during the update. Please visit the Customer Center to get more resources to prepare users for the update.

7. **Watch for Update Completion or Reschedule emails from Microsoft.**

Once your organization is updated, you will receive a notification from CRM Online indicating that your organization is ready to use.

After the Update

Following the update, your system will look different. This cleaner, more intuitive interface will be easier and faster to use.

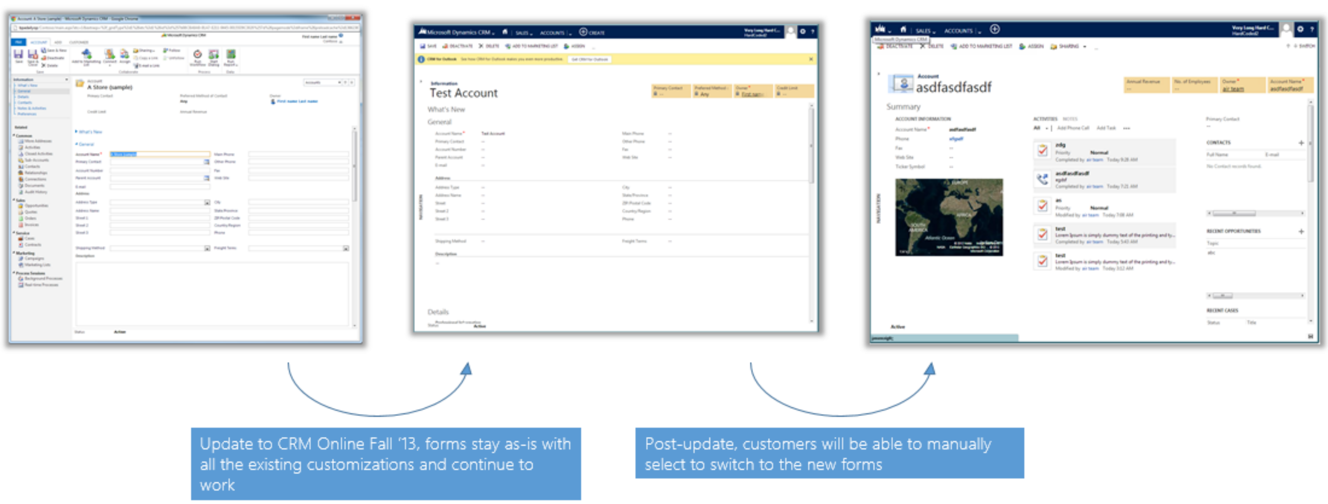
In order to prepare, please visit the [Get Ready]() page on the CRM Customer Center, where you will find videos, walkthroughs, and other information that you can use to familiarize yourself with the new experience.

Update Microsoft Dynamics CRM Online Fall ‘13 components

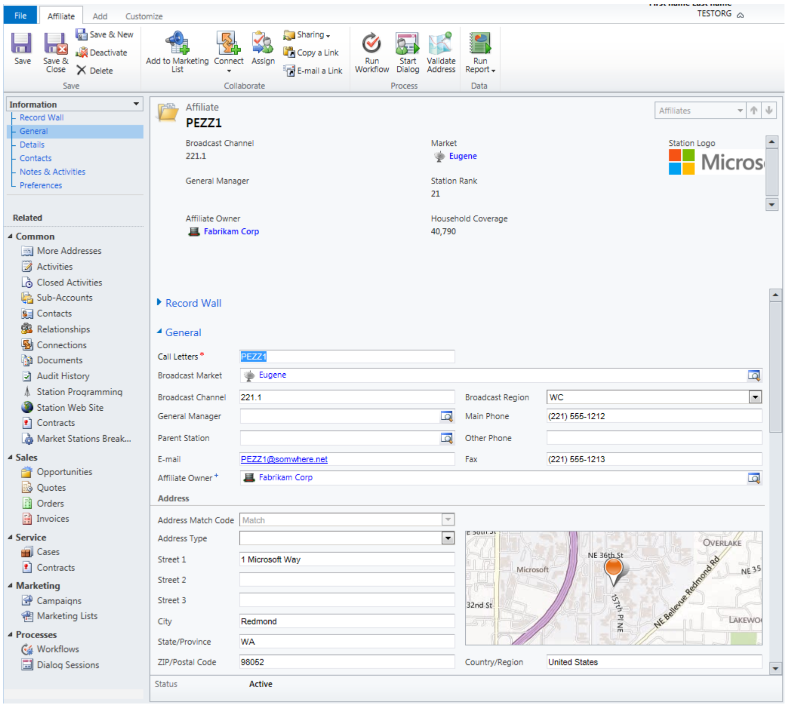
You can find more details about updating additional components, such as Microsoft Dynamics CRM for Outlook and the Microsoft Dynamics CRM Email Router, in the “Installing” section of the *Microsoft Dynamics CRM 2013 Implementation Guide*, which will be available in late September.

Update your customizations for the new user interface

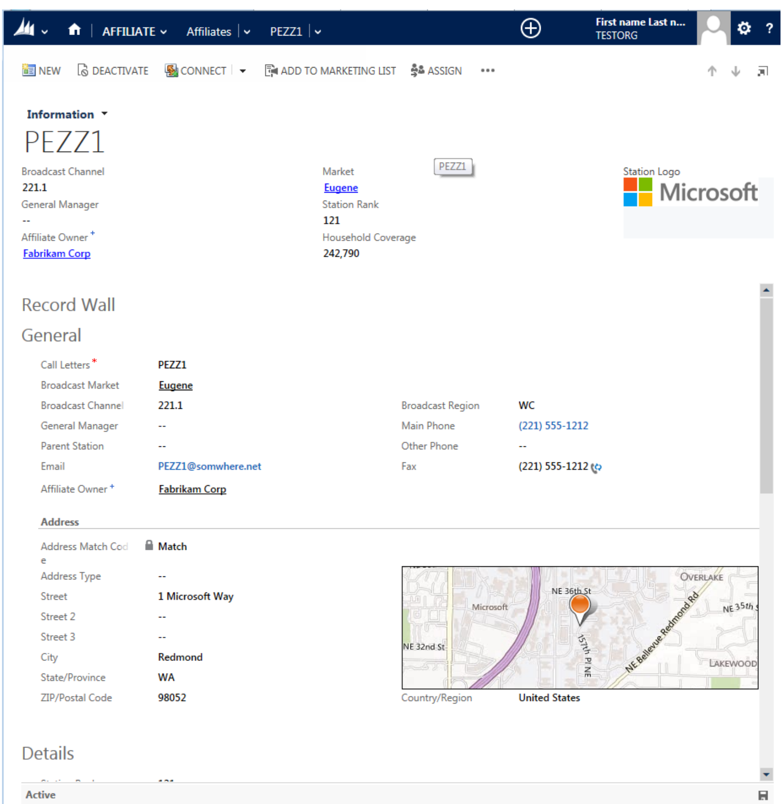
After the update, supported customizations to menus and forms from your previous version will continue to work, though they may appear slightly different to simplify the transition to the new user experience. The following shows the steps required to switch your forms to the new experience:



Let’s take a look at how you might experience this transition with your customizations. Here is an example of a form that has been heavily customized in CRM 2011:



After the update to CRM Online Fall ‘13, this form will now look like this:



As you can see, the original form layout is retained, as are the custom controls.

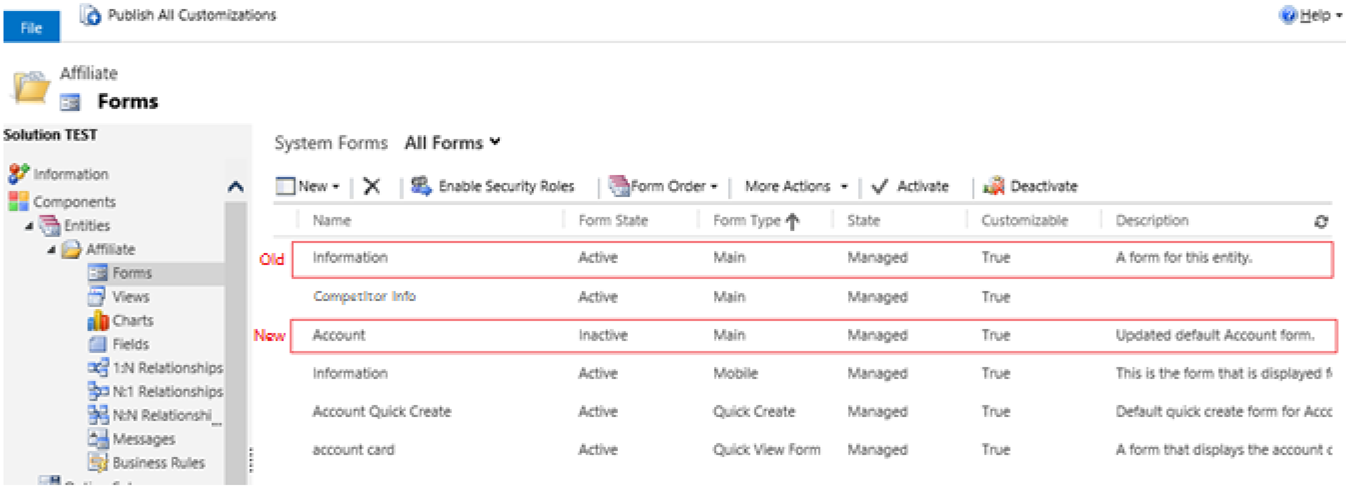
All supported scripts continue to operate. However, this is an intermediary step. Now you are ready to gain the full benefit of this new user experience.

Take full advantage of the new user experience

If you have customized forms, you must follow the steps below in order to complete the setup of the new CRM Online Fall '13 forms.

After your organization is updated, the new forms have been loaded into the system in a deactivated state. To view the forms, navigate to **Settings** > **Customizations > Customize the System**. If you have a custom solution installed, navigate to **Settings** > **Customizations > Solutions**. In either case, once you have expanded an entity you can see the forms for that entity.

For the example, you will see this:



Note that the highlighted "Information" form of the type "Main" is the old form. The new "Account" form of type "Main" is inactive. To fully take advantage of the new capabilities, you must switch to the new form by going through the process described below.

Before switching forms

Before you switch to the new form layouts, we encourage you read the new *Customization Guide*, which is part of the *Microsoft Dynamics CRM 2013 Implementation Guide* (available in late September), to develop a good understanding of new CRM Online Fall '13 features. This release adds a number of features that provide you with new options to display pictures, run a business process, control the layout of the form, and define plugin types. Form redesign is a great time to employ many of these new features.

If you are using a partner solution or worked with a partner to develop your current solution, this is a great time to re-engage with that partner so they can help you update your solution to CRM Online Fall '13.

Let's show you an example of how you can take advantage of several of the new features of CRM Online Fall '13.

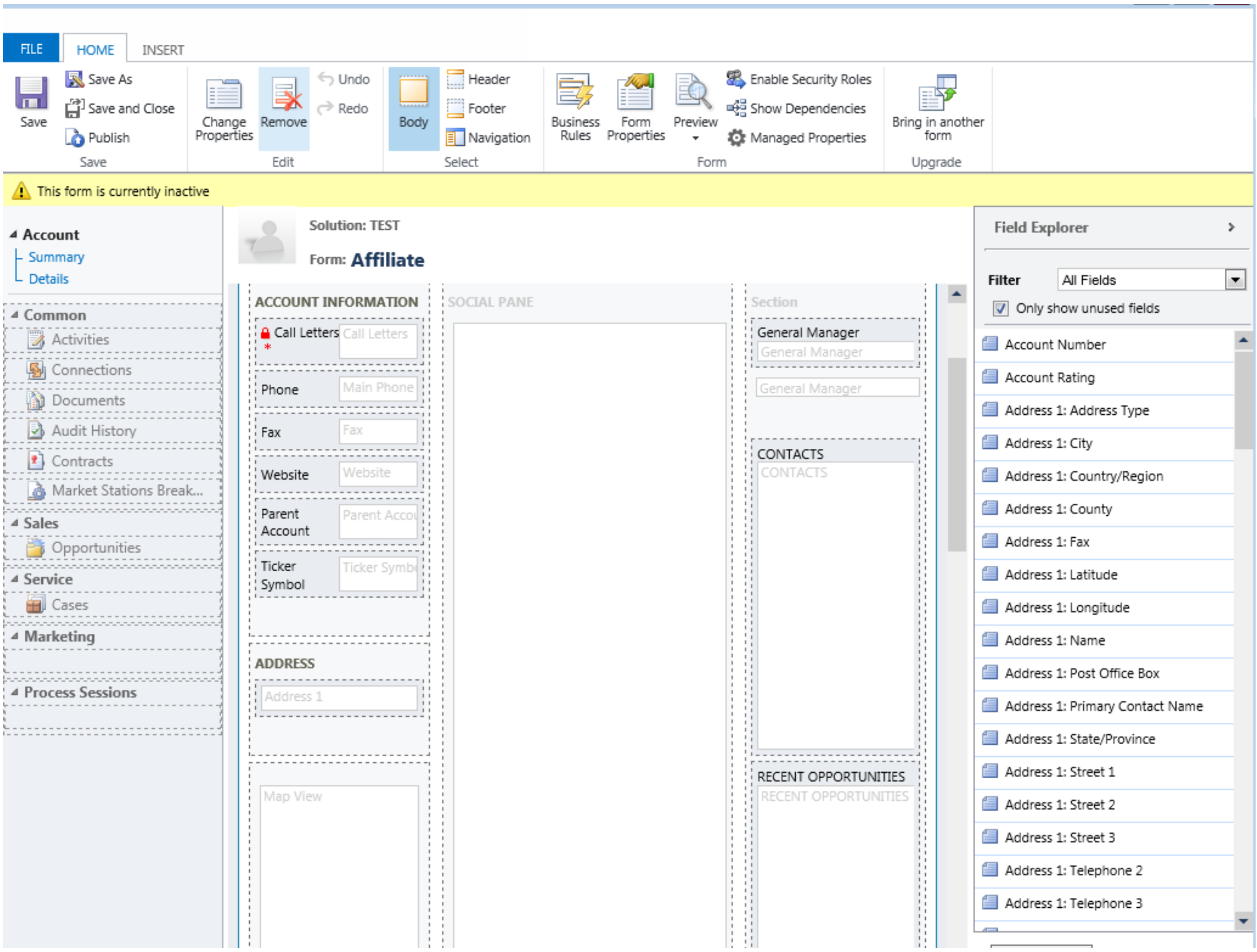
How to update your forms

When you work with updates to your customizations, we recommend that you create a solution to maintain those customizations within. This gives you a way to move your customizations from organization to organization or from a test environment to a production environment, as well as a means to identify your changes in the system. Creating a new solution is very easy. Please see the *Customization Guide* for more information about creating a solution.

Updating your customized forms is very simple. You can repeat this process for each form you customized. However, you do not have to do this all at once. This process can be done over time.

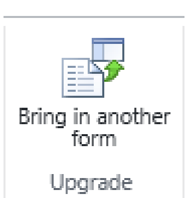
The CRM Online Fall '13 form will have the same name as the original name of the entity. In this case, that's "Account". Working from the point of view of the forms in the Affiliate entity (originally the Account entity), you would open the new form called "Account" in the form editor.

You will see this form in the form editor window:

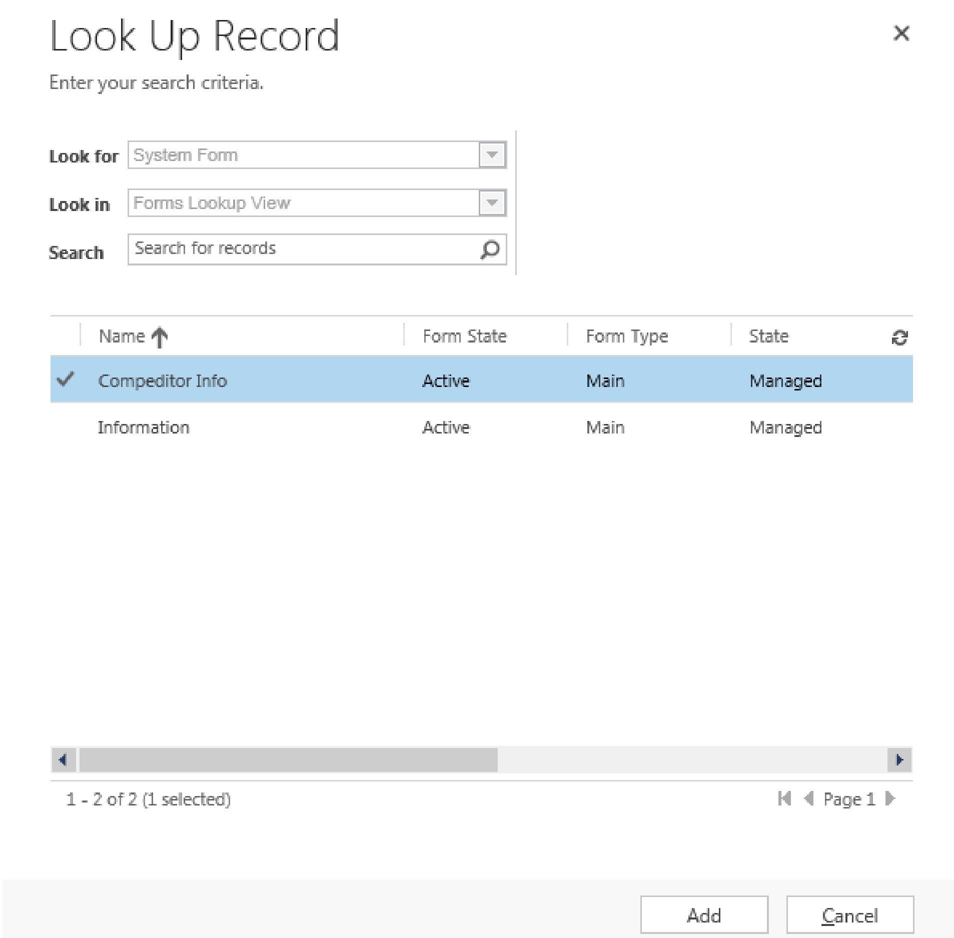


This is the CRM Online Fall ‘13 version of the affiliate page. As you can see, it’s clearly not in the format or structure that you had in the previous version of the form.

To assist you in updating forms to the new style, we provide a tool that will allow you to import the form elements from another form into your CRM Online Fall ‘13 form. In the form editor, click the **Bring in another form** button:

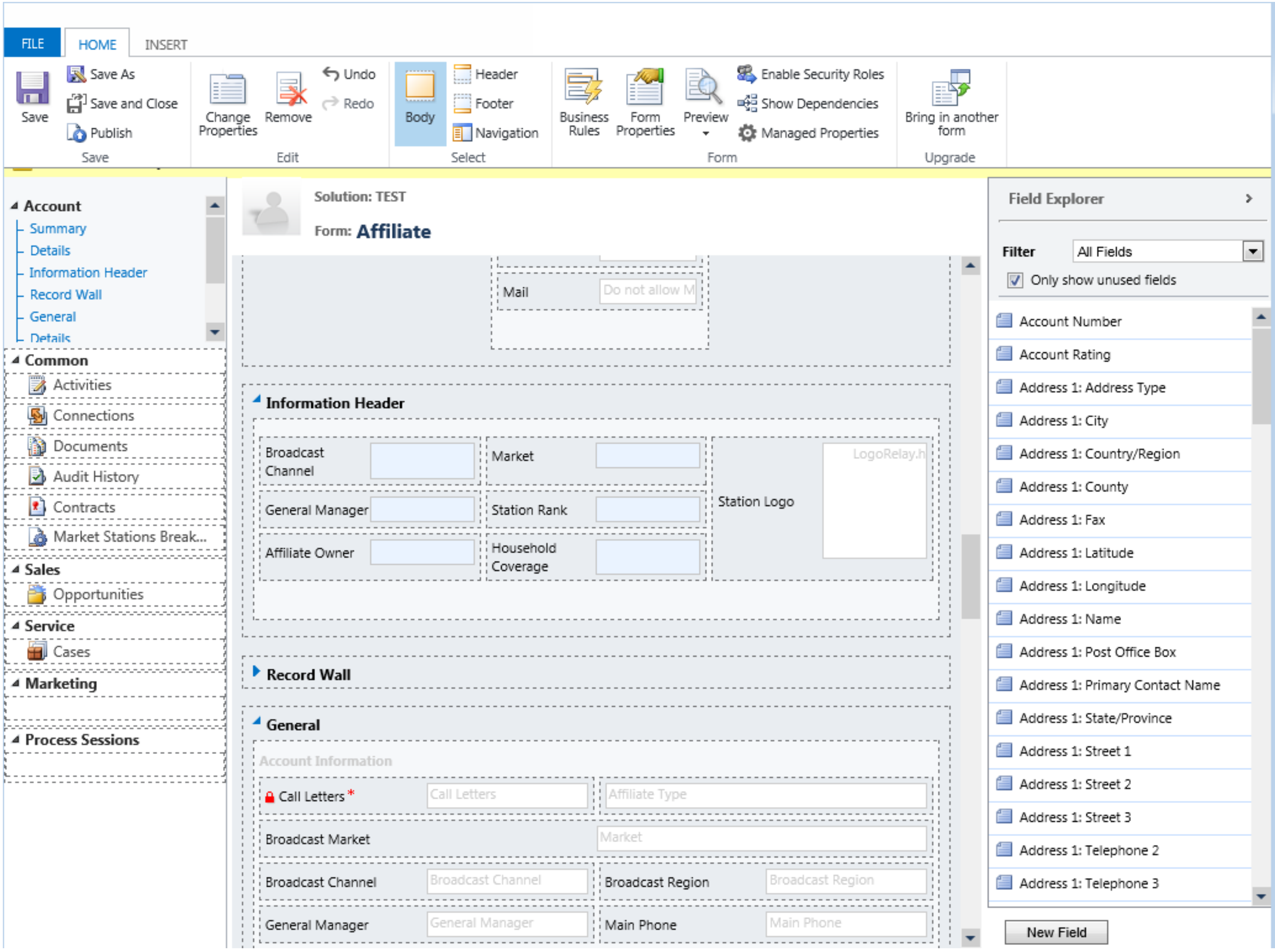


Clicking that button will present a list of forms from the previous version that you can choose from.

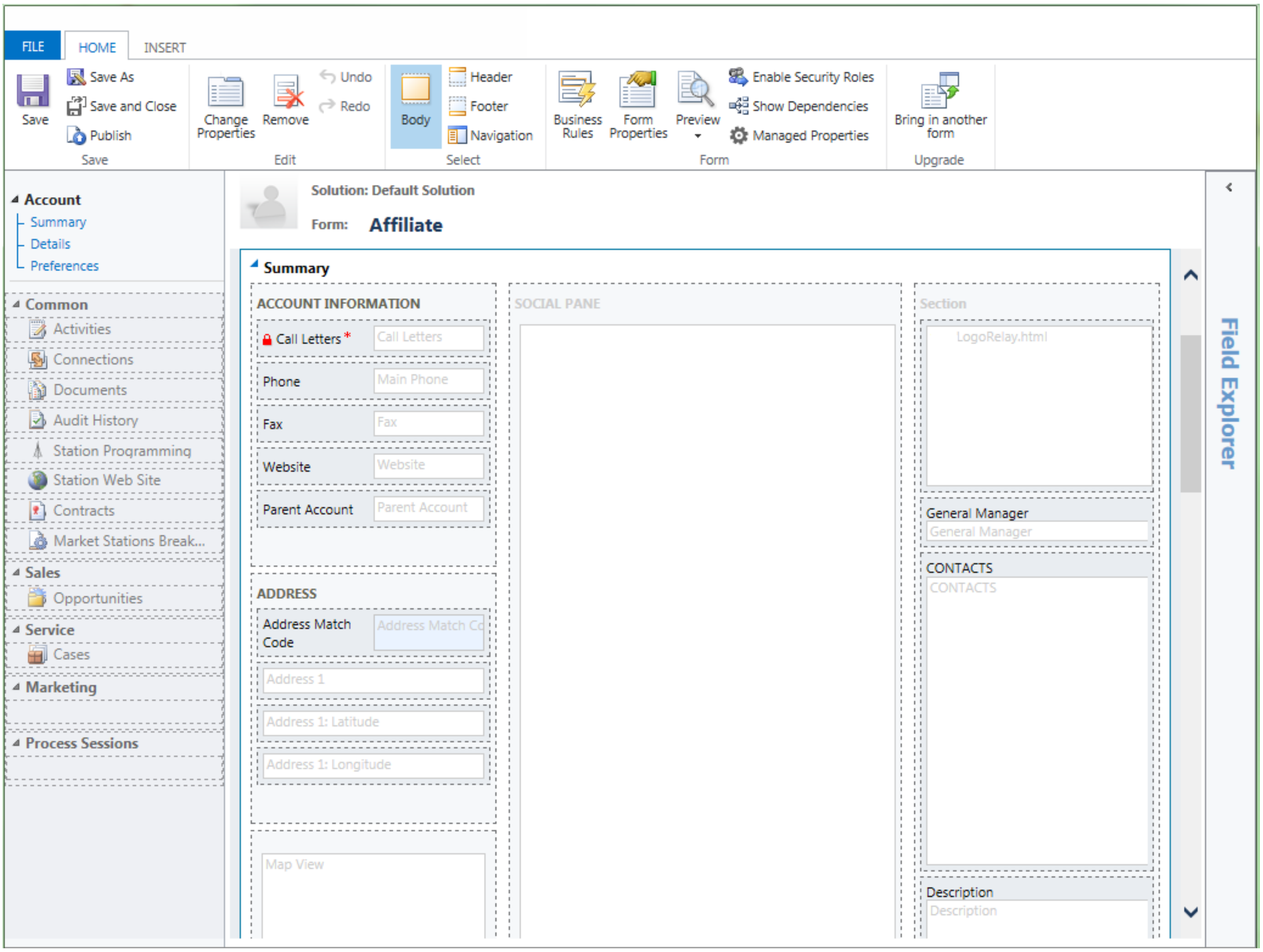


In this case, we will choose the Information form, as that is the form that has the current layout of our form, and then click **Add**. The content will be added to the form editor.

The following screenshot shows what was appended to the form:



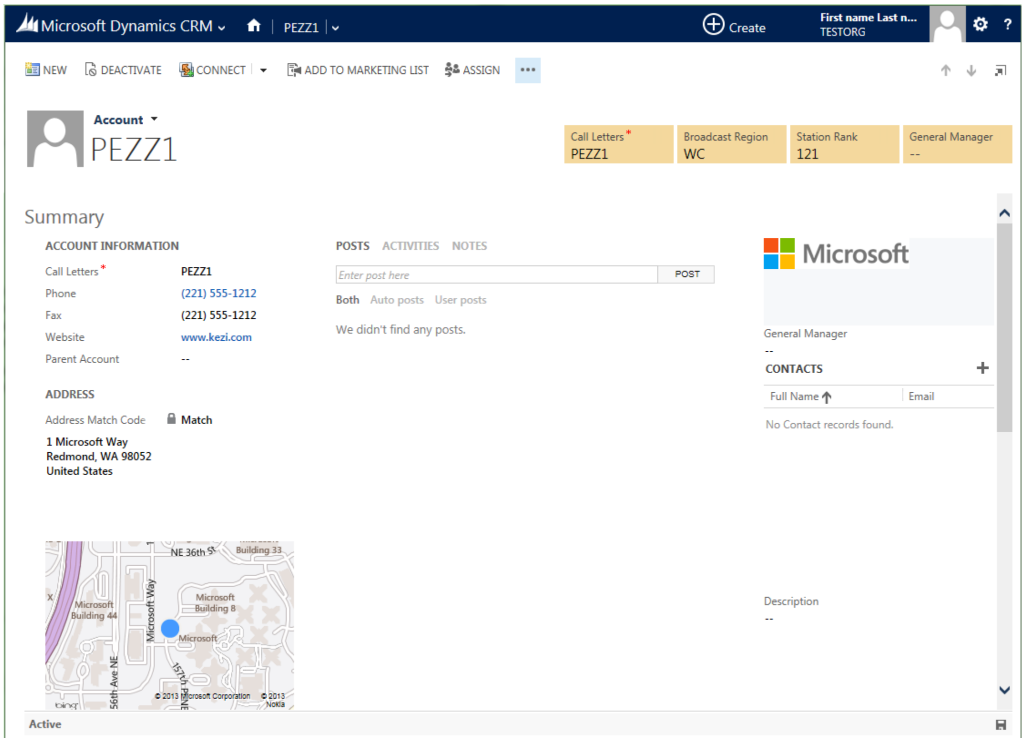
The result of the merge process looks like this:



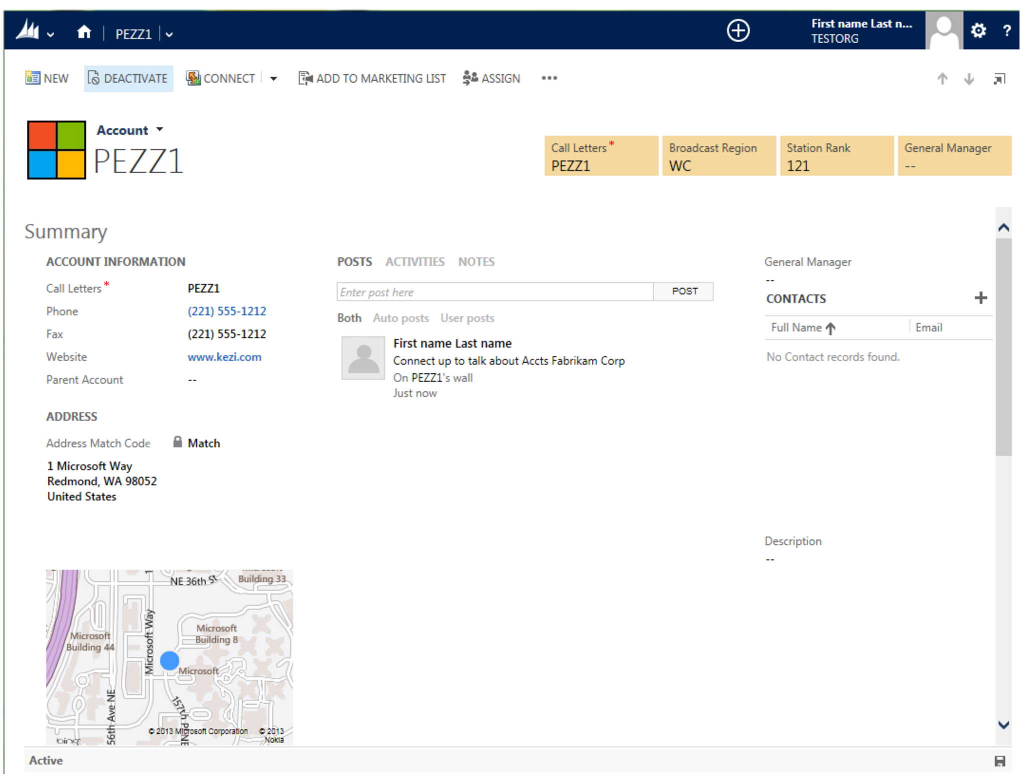
In this case, the previous version used a web resource that was connected to Bing to display the location of the entity on a map. With the CRM Online Fall '13 update, CRM includes this functionality out of the box, so you can remove that and use this new feature instead. On the other hand, you may want to keep the logo display for now as the system refers to an external site for that information.

You can also remove the address block, notes, and activities area, from the copy of the original form, using the new controls that CRM Online Fall '13 provides.

The updated form now looks like this:



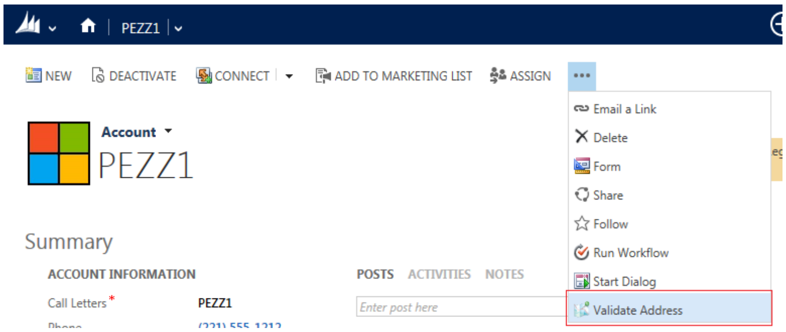
In the original form, the logo displayed in a web resource. CRM Online Fall '13 also includes a new Image data type that is associated to the account, so a few quick changes to the design and now it looks like this:



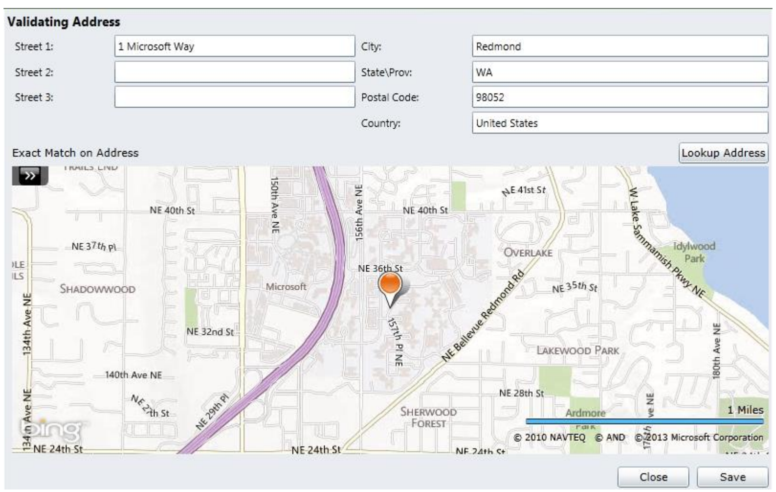
Next, test the program to make sure that everything is working as intended.

One of the features you should verify is the web resource that validates the address. Previously, the button appeared in the ribbon as shown here:

In CRM Online Fall ’13, it is now located here:

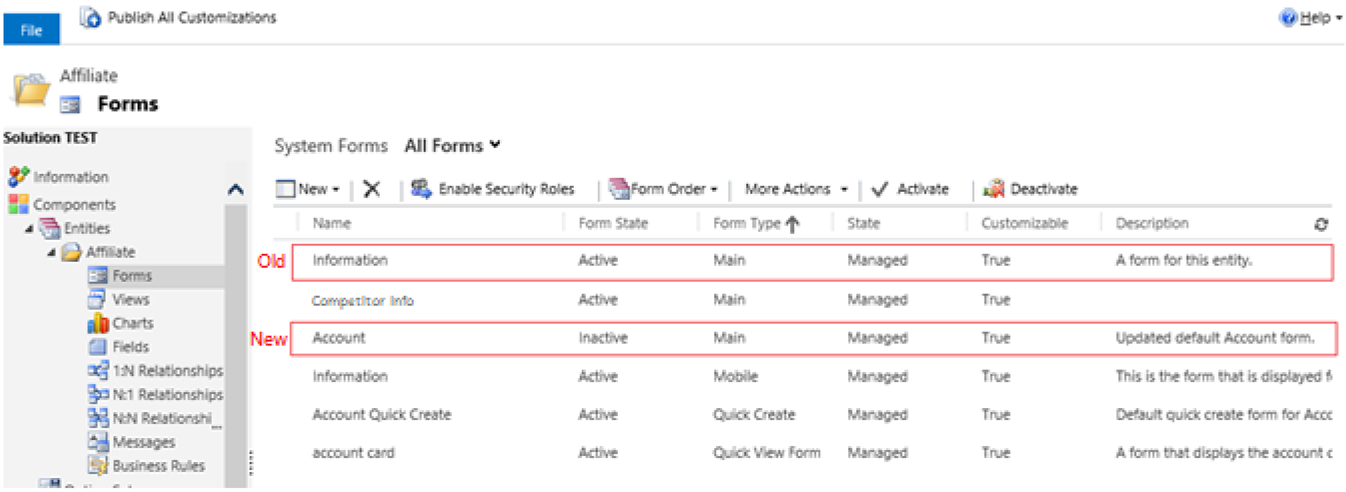


Clicking the **Validate Address** button opens this dialog box that allows you to choose an address to validate. Then it writes the validated information to the parent window, using the XRM JavaScript API.

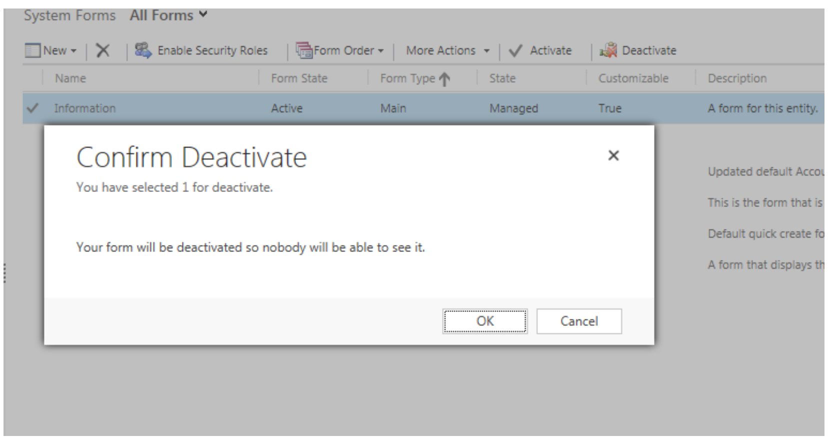


Here you can see all the address field values that are updated in the record when you click **Save**.

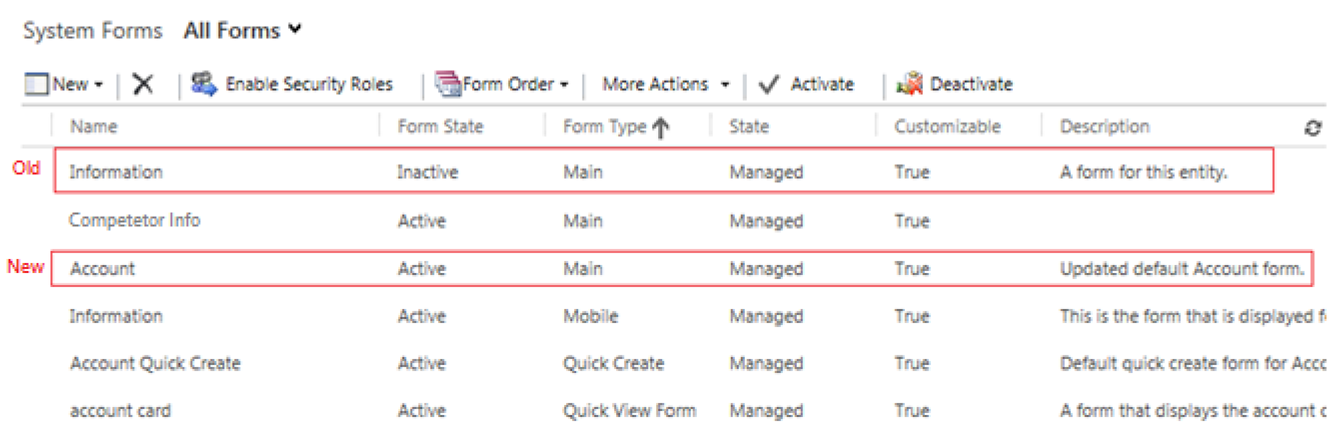
The last thing you need to do now that the form is updated to CRM Online Fall ‘13, is to disable the CRM 2011 form. To do that, return to the entity view in the **Settings** > **Customization** > **Solutions** area.



Select the Information form and then click **Deactivate**, which gives you the following prompt:



Once you confirm the deactivation, you will see that the previous form state marked "Inactive", and the Account entity form is "Active":



The updates are now complete for this form. The final step is to publish the customizations.

Changes to the JavaScript object model

The JavaScript object model is the JavaScript API that CRM provides to enable you to customize various behaviors based on events and to access CRM data that is present on a form.

CRM Online Fall ‘13 fully supports the JavaScript object model from the previous version; however, it does not support the JavaScript object model from Microsoft Dynamics CRM 4.0. If you have followed the steps in the “Prepare your CRM organization for the update” section of this document, this should not pertain to you. If you have not, please download and run the Microsoft Dynamics CRM 2013 Custom Code Validation Tool to verify that you will not have any issues prior to updating your organization.

How to update solutions

CRM Online Fall ‘13 supports importing solutions from the previous CRM Online service update.

Updating a CRM Online organization that contains solutions

There are a few key things to keep in mind when your organization with an unmanaged solution is updated.

The solution is updated to CRM Online Fall ‘13 together with the organization. There are several key differences in an updated organization compared to a new organization. Most important is the sitemap. In an updated organization, the sitemap will keep the original configuration defined in the organization and the sitemap sub-areas new to CRM 2013 will not appear. For example, the **Workplace** will still be present in the sitemap of an updated organization, whereas it would not be in a “new” CRM Online Fall ‘13 organization.

Managed solutions that are present in an organization are automatically updated to a CRM Online Fall ’13 solution; however, they cannot be exported. Updates to them must be done in a new unmanaged solution or in the default solution in CRM Online Fall ‘13. This will create a dependency on the older solution which may or may not be your goal. We recommend contacting the owner of the managed solution and request a version that has been updated to CRM Online Fall ‘13.

Importing a CRM 2011 solution into CRM Online Fall ‘13

You can directly import existing solutions into CRM Online Fall ’13. However, there are a few important things to understand in this process.

In the section **How to update forms** above, we covered that all entities have a CRM 2011 and a CRM Online Fall ‘13 form available to them in CRM Online Fall ‘13. When you import a CRM 2011 solution that contains any form customizations, those customizations will be applied to the CRM 2011 form only. This applies to both managed and unmanaged solutions. What that means is that each time you import a CRM 2011 solution that you want to use in your CRM Online Fall ‘13 forms, you must update the form to use it. This applies to forms only. The plugins, entities, and other solution objects in the updated solutions do not require any changes.

Conclusion

Microsoft has a powerful vision for CRM. It is defining and delivering a connected and forward-looking enterprise — the successful enterprise of the future, an enterprise that connects its employees, partners and customers to what they need, in the right context. The update to Microsoft Dynamics CRM Fall ’13 is the first step to realizing that potential. This document provides you with the information you need to prepare for this update.