



Hosted CRM Service Overview and Frequently Asked Questions

Hosted Microsoft CRM 3.0 for Service Providers

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1 Introduction

The present document provides service overview information that service providers should review prior to deploying Hosted CRM in a Windows Server System hosting environment. The actual steps to deploy the Hosted CRM components are found in the document titled the Hosted Microsoft Dynamics CRM 3.0 Solution Components Deployment Guide.

Hosted Microsoft Dynamics CRM 3.0 Solution Components can be found at:
<https://members.microsoft.com/serviceproviders/webhosting/hostedmessaging/default.aspx>

2 Software Requirements

Software Requirements for the CRM Application Server

Software	Description
Windows Server 2003 SP1	Standard or Enterprise Edition
Indexing Service	Installed and service started
Internet Information Services (IIS)	Version 6.0 (included with Windows Server 2003)
Microsoft Data Access Components (MDAC)	Version 2.8 (included with Windows Server 2003)
Microsoft XML Core Services (MSXML)	Version 4.0 with Service Pack 2 (installed during Microsoft CRM-SP Server installation)
Microsoft .NET Framework 1.1	Installed during Microsoft CRM-SP Server installation

Note: In order to install the Hosted 3.0 – SP version, we must acquire the Solution through an Authorized Licensed Reseller. All other CRM 3.0 versions will not work in this architecture.

MS SPLA SKU:

CRM PRO HOSTING 3.0 W2K/W23 DISK KIT CD ENGLISH
(Software Spectrum: M201315)

Warning! Microsoft released the “Hosted CRM” Model March 2006. Be sure to order the 4 SPLA CDs mentioning the Hosted Model - not Exchange, which is multi language, CRM media must be in the language of your choice. We noticed that the CRM media have been rebuilt at different times (April for the English version, July for the French version).

3 Microsoft CRM 3.0 Laptop Client Requirements

Microsoft CRM 3.0 Laptop Client Requirements

Software	Description
Windows® operating system	Windows 2000 Professional with SP4 or Windows XP Professional with SP1 (Service Pack 2 is supported but not required.)
Office software	Microsoft Office 2003 Editions with SP1 - OR - Microsoft Office XP (2002) with SP3
Other software	Microsoft .NET Framework 1.1 Windows Indexing Service

4 Hardware Requirements

Hardware Requirements for the CRM Application Server

Hardware	Description
CPU	Dual 700 MHz or higher Intel Pentium (Xeon PIII) or compatible CPU Recommended: Dual 1.8 GHz Pentium (Xeon P4)
Memory (RAM)	1 gigabyte (GB) Recommended: 2 GB when SQL Server is also installed on the server
Hard disk	SCSI with hardware (RAID 1 or RAID 0+1)
Network card	10/100 megabit

With the "all-in-one" server, the CRM database server and application server are combined on the same physical server. This configuration simplifies the deployment process and reduces deployment costs by eliminating the need to build an additional database server for each customer. All-in-One server will support up to 50 CRM users

Note: An all-in-one server can adequately process CRM activities for many if not most of your Hosted CRM customers.

You can install a separate CRM database server to improve CRM system performance for those customers with a greater number of users, or users who access the system heavily. When deploying a dedicated database server, the server is placed on the BackNet of Hosted Messaging and Collaboration, which offers some additional security by eliminating direct access to the server from the Internet.

Note: To maintain high performance levels, consider using a dedicated SQL server for a Hosted CRM customer that has more than **50 users** and using the recommended hardware. The customer's overall usage profile — system demand from users — will also be a factor in any decision about deploying a dedicated CRM database server.

5 Hosted CRM Limitations

Service providers should be aware that the Hosted CRM service does not support the following features:

- Multi-tenancy

Unlike other hosted applications that run on the Hosted Messaging and Collaboration infrastructure, Hosted CRM does not function as a multi-tenant application yet. You cannot host multiple CRM customers on a single CRM application server. You must deploy a separate physical CRM application server for each Hosted CRM customer.

- Workflow tools

Workflow tools enable organizations to automate business policies, tasks, and sales processes. This functionality has not been modified to work over the Internet in a hosting scenario. Service providers may wish to develop workflow tool solutions as a value-added service to Hosted CRM using terminal services or other technologies.

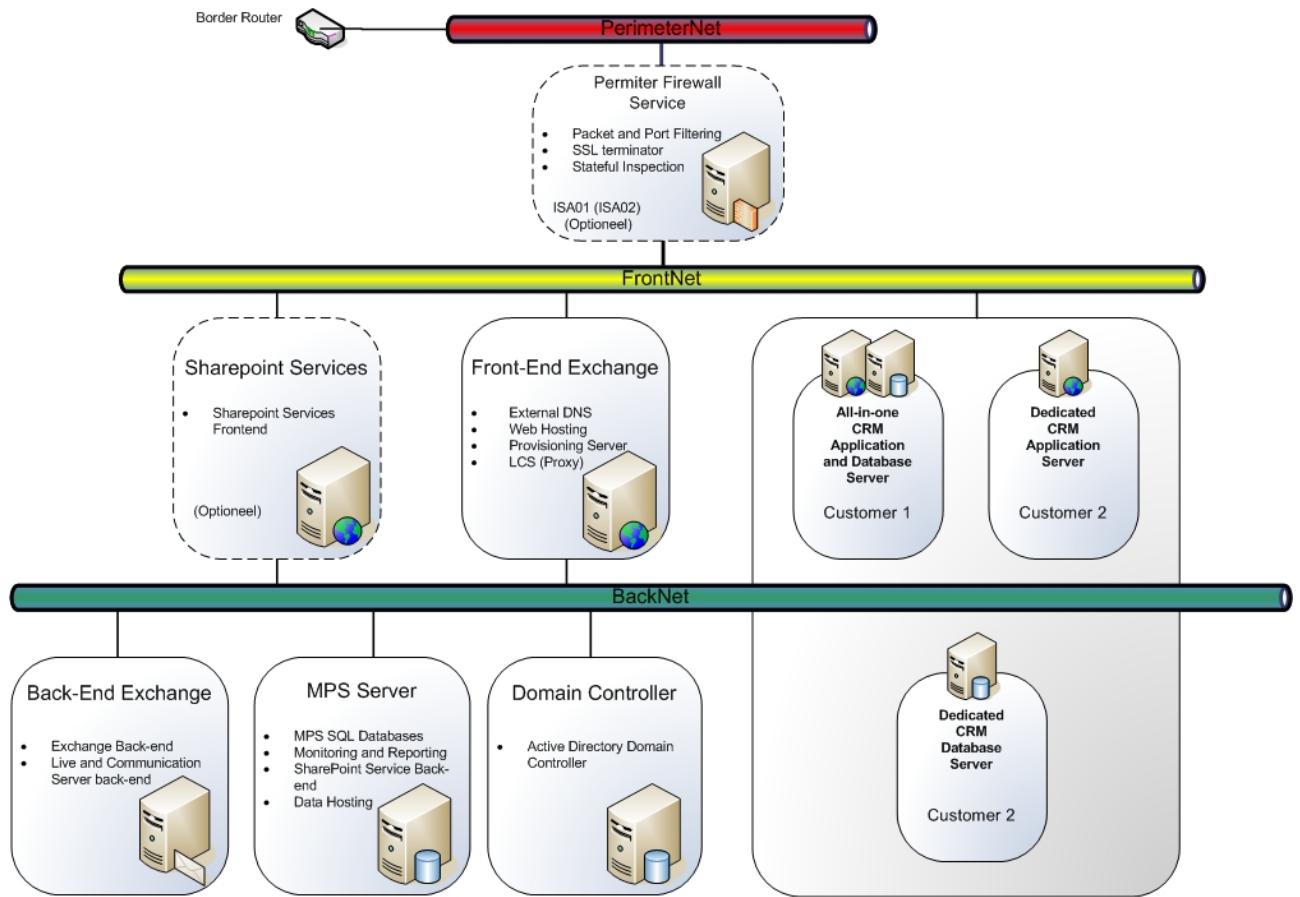
- Customized report publishing

To modify the default reports, or to create your own SQL Server 2000 Reporting Services reports, the Report Designer component of Reporting Services must use Microsoft Visual Studio .NET 2003 or 2005 installed on a client computer in the same domain. This functionality has not been tested in a hosting environment.

- Excel integration

The ability to import sales and business data into a user's Microsoft Office Excel application has not been tested and is not supported in the Hosted CRM.

6 Architecture Design



Note: This is the minimum required setup for Hosted CRM 3.0, but we strongly advise to have 2 domain Controllers and a Clustered Exchange Environment.

7 Frequent Asked Questions

Q: What is the best way to publish a CRM Server over the Internet?

A: You can publish a server by using an ISA Server, or you can place the CRM Server in a DMZ. We advise using the ISA server as this will be more secure. And you will have more options on Certificates and Filtering.

Q: Can I move the CRM Website from the CRM Server?

A: No

Q: Can I use a Wildcard Certificate?

A: Yes, the best way to take advantage of a wildcard certificate is through the use of ISA Server as you will be using inside and outside certificates.

Q: Will the CRM functionalities be available in Outlook Web Access?

A: No

Q: How will the Outlook client authenticate with the CRM Server?

A: When you install the CRM Outlook Web client you need to provide a Server URL (<https://crmserveradres.company.com>) Each time you use Outlook you will receive an CRM authentication box.

Q: What are the Hardware requirements for CRM?

A: Dual 700 Mhz or higher Intel Pentium (Xeon III) or compatible CPU – 1 GB Ram – SCSI with Raid 5. Recommended: Dual 1.8 GHz Pentium (Xeon P4) with 2 GB Ram when SQL is also installed on the server.

Q: Can I use virtual servers for Hosted CRM?

A: Yes, for small customers you can run virtual servers. However, this configuration is not supported in this solution.

Q: Can I run multiple CRM databases on one SQL Server?

A: No, this is not supported in the Hosted CRM environment; you need a dedicated SQL server for every customer.

Q: Can I use SQL 2005, or do I need SQL 2000?

A: The solution currently only supports SQL 2000

Q: Is it possible to separate SQL Reporting Services?

A: The solution will install Reporting Services on the Dedicated Servers; moving the REportins Services to another location is not supported by the solution.

Q: Do I need a separate Active Directory for every customer?

A: No, the solution is designed to plug into Hosted Messaging and Collaboration 3.5 where Active Directory is centralized management source.

Q: Do I need domain mode "List Object Access" or can it be left normal?

A: The solution requires List Object Mode

Q: Do I need to edit Service Principal Names (SPN) manually?

A: Only when desired

Q: Is it possible to use virtual directories to share a single certificate?

A: No, CRM is installed dedicated on one server. But you can use a wild-card certificate to run multiple CRM web servers based on one certificate.

Q: Can I manually create the Microsoft CRM v3.0 IFD and move it on another CRM server?

A: The IFD Website is created when the application server is installed and must run in the same application pool as the default site.

Q: Where can I find the ISAPI filter for the forms-based authentication?

A: The ISAPI filter is installed with the solution

Q: Is it possible to script the CRM Laptop client?

A: Yes, the installation is like a regular .msi install

Q: Is it possible to script the addition of adding the CRM-site to "trusted sites"?

A: This activity occurs on the local system. You should be able to script this, but local admin rights may be required by the customer.

Q: Am I allowed to change the logon.aspx code?

A: Yes, as long the underlying code or asp.net server-side component names used are not changed

Q: Where can I configure the CRM Cookie Expiration?

A: The registry key can be found at
\\HKLM\SOFTWARE\Microsoft\MSCRM\SessionExpirationMinutes. The default is 60 minutes.

Q: Is this cookie updated during activity or will the user need to logon after this specified time?

A: The cookie will be updated every time a user is active

Q: Do I need a special CD to install the application?

A: There is a special build of CRM for Service Providers and this must be ordered from Solution Media supplier. Also the Laptop Client Setup CD will be provided.

Q: Is there a requirement for the Exchange CRM router or can we use any Exchange server for this purpose?

A: The documentation advises you to use a dedicated Exchange Server for each reseller. This will give the reseller the possibilities to manage the CRM Router mailboxes. But it's also possible to share one CRM Exchange Router with other resellers.

Q: Do I need a dedicated SMTP server? Like the solution describes the EXSMTP01.

A: You must have a server specified in the exchange setup as SMTP role, but a dedicated SMTP server is not required.

Q: What's the minimum required Server to start Hosted CRM?

A: See Architecture Design, but we advise the following setup

AD01, AD02	always 2 DC's
FE01 and FE02	Using Network Load balancing
BE01, BE02	Clustered Exchange
Prov01	Provisioning Server
Mps01	Combine MPS SQL and MPS01 for backend
CRMAPP01, CRMSQL01	Email router and 1 customer app and 1 customer SQL (Can combine app and SQL in an all-in-one solution)