

# Microsoft Dynamics CRM 2013 development server installation

Jukka Niiranen

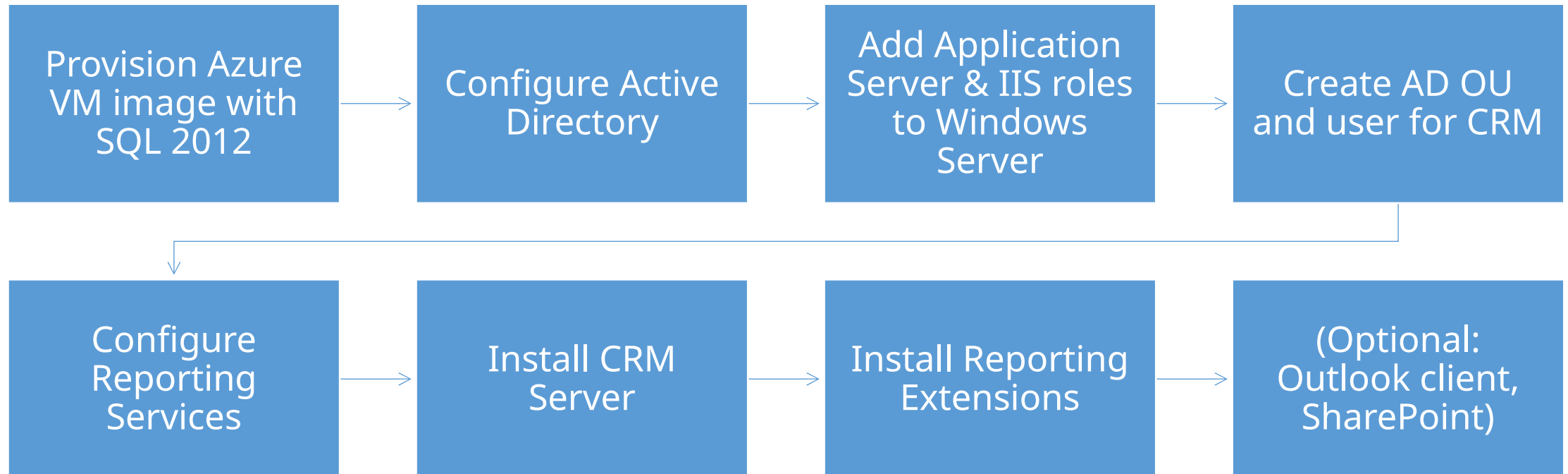
<http://niiranen.eu/crm/>

[@jukkan](#)

# Running a CRM 2013 dev machine in Azure

- These slides will show you the minimum required steps for setting up a Microsoft Dynamics CRM 2013 development server
- The platform used for running the server is Windows Azure Virtual Machines, but any Windows Server 2012 virtual machine will do
- We'll use a pre-configured SQL Server image that can leverage the [MSDN subscriber benefit](#) of free Azure Credits
  - See [this post](#) by Scott Guthrie for details on MSDN discount pricing for VMs
- Note: DO NOT follow these steps when deploying a production environment! We're building a single dev box and skipping all the important configuration tasks that are required when setting up a live CRM server. Check out the [implementation guide](#) for more details.

# Installation process steps



## CREATE A VIRTUAL MACHINE

## Virtual machine image selection

ALL

PLATFORM IMAGES

MY IMAGES

MY DISKS



Windows Server 2008 R2 SP1



SharePoint Server 2013 Trial



SQL Server 2014 CTP1 Evaluation on WS 2012



SQL Server 2014 CTP1 Evaluation on WS 2012 R2



SQL Server 2012 SP1 Enterprise on WS 2008 R2



SQL Server 2012 SP1 Enterprise on WS 2012



SQL Server 2012 SP1 Standard on WS 2008 R2



SQL Server 2012 SP1 Standard on WS 2012



SQL Server 2012 SP1 Web on WS 2008 R2



SQL Server 2008 R2 SP2 Enterprise on WS 2008 R2



SQL Server 2008 R2 SP2 Standard on WS 2008 R2



## SQL Server 2012 SP1...

SQL Server 2012 SP1 Enterprise on Windows Server 2012. This image contains the full version of SQL Server. Some SQL Server components require additional setup and configuration before use. We recommend that you use a virtual machine size of large or higher.

PUBLISHER

Microsoft SQL Server Group

OS FAMILY

Windows

LOCATION

East Asia;Southeast Asia;North Europe;West Europe;Central US;East US;East US 2;West US

## PRICING INFORMATION

Pricing varies based on the subscription you select to provision your virtual machine.



2 3 4

Choose to create a new VM from the gallery. Pick SQL 2012 Enterprise to ensure you can import CRM databases from any environment without manually removing the audit log partitions not supported by SQL Standard

cores and 7 GB memory if you have enough credits, a Medium VM will also do. Once the virtual machine provisioning process is complete, select Connect to open a remote desktop session to the new

Windows Azure
CREDIT STATUS

**crm2013beta**

SQL2012

---

VM with 4  
and 7 GB  
you have  
credits, a  
will also  
e virtual  
provisioning  
complete,  
ct to open  
desktop  
the new

## crm2013beta

[DASHBOARD](#)
[MONITOR](#)
[ENDPOINTS](#)
[CONFIGURE](#)

CPU PERCENTAGE ✓ DISK READ BYTES/SEC ✓ DISK WRITE BYTES/SEC ✓ NETWORK IN ✓ NETWORK OUT ✓

RELATIVE ▼ 24 HOURS ▼ ↺

web endpoint status PREVIEW

You have not configured a web endpoint for monitoring. Configure one to get started.

[CONFIGURE WEB ENDPOINT MONITORING](#) ➔

usage overview

CRM2013BETA
  OTHER ROLES
  AVAILABLE

CRM2013BETA 8 of 20 CORE(S)

disks

DISK	TYPE	HOST CACHE	VHD
crm2013beta-crm2013beta-...	OS disk	Read/Write	http://portalvhdsrgt3m6mn0

### quick glance

**STATUS**  
Running

**DNS**  
[cloudapp.net](#)

**HOST NAME**  
crm2013beta

**PUBLIC VIRTUAL IP (VIP) ADDRESS**

**INTERNAL IP ADDRESS**

**SIZE**  
Large (4 cores, 7 GB memory)

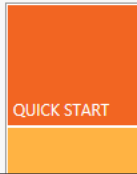
**DISKS**  
1

+ NEW

CONNECT
RESTART
SHUT DOWN
ATTACH
DETACH DISK
CAPTURE
DELETE

?

WELCOME TO SERVER MANAGER



1 Configure this local server

2 Add roles and features

Add Roles and Features Wizard

Select server roles

DESTINATION SERVER  
crm2013beta

Before You Begin  
Installation Type  
Server Selection  
**Server Roles**  
Features  
AD DS  
Confirmation  
Results

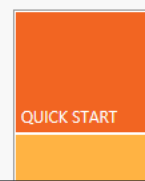
Select one or more roles to install on the selected server.

Roles	Description
<input type="checkbox"/> Active Directory Certificate Services	
<input checked="" type="checkbox"/> Active Directory Domain Services	Active Directory Domain Services (AD DS) stores information about objects on the network and makes this information available to users and network administrators. AD DS uses domain controllers to give network users access to permitted resources anywhere on the network through a single logon process.
<input type="checkbox"/> Active Directory Federation Services	
<input type="checkbox"/> Active Directory Lightweight Directory Services	
<input type="checkbox"/> Active Directory Rights Management Services	
<input type="checkbox"/> Application Server	
<input type="checkbox"/> DHCP Server	
<input type="checkbox"/> DNS Server	
<input type="checkbox"/> Fax Server	
▸ <input checked="" type="checkbox"/> File And Storage Services (Installed)	
<input type="checkbox"/> Hyper-V	
<input type="checkbox"/> Network Policy and Access Services	
<input type="checkbox"/> Print and Document Services	
<input type="checkbox"/> Remote Access	
<input type="checkbox"/> Remote Desktop Services	

< Previous Next > Install Cancel

Go to Server Manager and click "Add roles and features". Choose Active Directory Domain Services.

WELCOME TO SERVER MANAGER



1 Configure this local server

2 Add roles and features

Add Roles and Features Wizard

DESTINATION SERVER  
crm2013beta

Select features

Before You Begin  
Installation Type  
Server Selection  
Server Roles  
**Features**  
AD DS  
Confirmation  
Results

Select one or more features to install on the selected server.

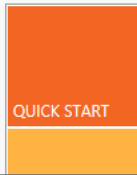
Features	Description
<input checked="" type="checkbox"/> User Interfaces and Infrastructure (Installed)	
<input type="checkbox"/> Windows Biometric Framework	
<input type="checkbox"/> Windows Feedback Forwarder	
<input checked="" type="checkbox"/> Windows Identity Foundation 3.5	
<input type="checkbox"/> Windows Internal Database	
<input checked="" type="checkbox"/> Windows PowerShell (Installed)	
<input type="checkbox"/> Windows Process Activation Service	
<input checked="" type="checkbox"/> Windows Search Service	Windows Search Service provides fast file searches on a server from clients that are compatible with Windows Search Service. Windows Search Service is intended for desktop search or small file server scenarios, and not for enterprise scenarios.
<input type="checkbox"/> Windows Server Backup	
<input type="checkbox"/> Windows Server Migration Tools	
<input type="checkbox"/> Windows Standards-Based Storage Management	
<input type="checkbox"/> Windows System Resource Manager [Deprecated]	
<input type="checkbox"/> Windows TIFF IFilter	
<input type="checkbox"/> WinRM IIS Extension	

< Previous Next > Install Cancel

On the Features screen, select Windows Identity Foundation 3.5 and Search Service (not sure if this replaces the old Indexing Service requirement, but it won't hurt you).

- Dashboard
- Local Server
- All Servers
- File and Storage Services ▸

WELCOME TO SERVER MANAGER



1 Configure this local server

2 Add roles and features

### Add Roles and Features Wizard

DESTINATION SERVER  
crm2013beta

#### Confirm installation selections

Before You Begin

Installation Type

Server Selection

Server Roles

Features

AD DS

**Confirmation**

Results

To install the following roles, role services, or features on selected server, click Install.

☒ Restart the destination server automatically if required

Optional features (such as administration tools) might be displayed on this page because they have been selected automatically. If you do not want to install these optional features, click [Previous](#) to clear their check boxes.

- Active Directory Domain Services
- Group Policy Management
- Remote Server Administration Tools
  - Role Administration Tools
    - AD DS and AD LDS Tools
      - AD DS Tools
        - AD DS Snap-Ins and Command-Line Tools
      - Active Directory Administrative Center
      - Active Directory module for Windows PowerShell
- Windows Identity Foundation 3.5

[Export configuration settings](#)  
[Specify an alternate source path](#)

< Previous   Next >   Install   Cancel

### Add Roles and Features Wizard

If a restart is required, this server restarts automatically, without additional notifications. Do you want to allow automatic restarts?

Yes   No

Allow the wizard to reboot the server after the AD DS has been installed.



- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage Services ▸

WELCOME TO SERVER MANAGER

- QUICK START
- 1 Configure this local server
  - 2 Add roles and features

Add Roles and Features Wizard

Installation progress

DESTINATION SERVER  
crm2013beta

Results

View installation progress

Feature installation

Configuration required. Installation succeeded on crm2013beta.

Active Directory Domain Services

Additional steps are required to make this machine a domain controller.

Promote this server to a domain controller

Group Policy Management

Remote Server Administration Tools

Role Administration Tools

AD DS and AD LDS Tools

AD DS Tools

AD DS Snap-Ins and Command-Line Tools

Active Directory Administrative Center

Active Directory module for Windows PowerShell

1

You can close this wizard without interrupting running tasks. View task progress or open this page again by clicking Notifications in the command bar, and then Task Details.

Export configuration settings

< Previous

Next >

Close

Cancel

server 1

ability

ance

ults

8/24/2013 2:04 PM

All Servers 1

Manageability

Events

4 Services

Performance

BPA results


8/24/2013 2:04 PM

Once AD DS appears as a role in Server Manager, it's time for a reboot. You'll still log in with a local account after this.

- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage Services ▸

## SERVERS

All servers | 1 total

 Configuration required for Active Directory Domain Services at CRM2013BETA

TASKS

[More...](#)

Filter


Server Name	IPv4 Address	Manageability	Last Update	Windows Activation
CRM2013BETA	100.86.228.39	Online - Performance counters not started	8/24/2013 2:04:31 PM	00184-90000-00001-AA620 (Activated)


## All Servers Task Details

## All Servers Task Details and Notifications

All Tasks | 1 total

Filter

Status	Task Name	Stage	Message	Action	Notifications
	Post-deployment Configuration	Not Sta...	Configuration required for Active Directory Do...	<a href="#">Promote this server to a domain...</a>	1

Status	Notification	Time Stamp
	Additional steps are required to make this machine a domain controller.	8/24/2013 2:04:32 PM

Next we'll configure the domain. Click on the server notifications bar and select "Promote this sever to a domain controller".

All services | 12 total

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



Active Directory Domain Services Configuration Wizard

## Deployment Configuration

TARGET SERVER  
crm2013beta

Select the deployment operation

☐ Add a domain controller to an existing domain  
☐ Add a new domain to an existing forest  
☒ Add a new forest

Specify the domain information for this operation

Root domain name:

[More about deployment configurations](#)

< Previous   Next >   Install   Cancel

Choose to add a new forest and enter a root domain name like NAME.local.

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage

**SERVICES**  
All servers | 1 total

### Active Directory Domain Services Configuration Wizard

## Domain Controller Options

TARGET SERVER  
crm2013beta

Deployment Configuration

Domain Controller Options

DNS Options

Additional Options

Paths

Review Options

Prerequisites Check

Installation

Results

Select functional level of the new forest and root domain

Forest functional level: Windows Server 2012

Domain functional level: Windows Server 2012

Specify domain controller capabilities

☒ Domain Name System (DNS) server

☒ Global Catalog (GC)

☐ Read only domain controller (RODC)

Type the Directory Services Restore Mode (DSRM) password

Password: .....

Confirm password: .....

[More about domain controller options](#)

< Previous Next > Install Cancel

Choose WS2012 functional level, check the DNS box and choose a password for Directory Services Restore Mode.

**SERVICES**

All services | 12 total

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled

**SERVICES**  
All services | 12 total

### Active Directory Domain Services Configuration Wizard

**DNS Options**

- Deployment Configuration
- Domain Controller Options
- DNS Options**
- Additional Options
- Paths
- Review Options
- Prerequisites Check
- Installation
- Results

TARGET SERVER  
crm2013beta

**DNS Options**

A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found... [Show more](#)

Specify DNS delegation options

☐ Create DNS delegation

**DNS Options**

A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found or it does not run Windows DNS server. If you are integrating with an existing DNS infrastructure, you should manually create a delegation to this DNS server in the parent zone to ensure reliable name resolution from outside the domain "GLOBAL.local". Otherwise, no action is required.

OK

[More about DNS delegation](#)

< Previous Next > Install Cancel

**TASKS**

More...

620 (Activated)

**TASKS**

More...

You will get a notification saying "a delegation for this DNS server cannot be created", which you can safely ignore on a development server.

**SERVICES**  
All services | 12 total

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage

**SERVICES**  
All servers | 1 total

### Active Directory Domain Services Configuration Wizard

## Additional Options

TARGET SERVER  
crm2013beta

Deployment Configuration

Domain Controller Options

DNS Options

**Additional Options**

Paths

Review Options

Prerequisites Check

Installation

Results

Verify the NetBIOS name assigned to the domain and change it if necessary

The NetBIOS domain name:

[More about additional options](#)

< Previous Next > Install Cancel

Verify the NetBIOS  
name assigned to the  
domain and click Next.

**SERVICES**

All services | 12 total

Filter				
Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage

**SERVICES**  
All servers | 1 total

### Active Directory Domain Services Configuration Wizard

**Paths**

**TARGET SERVER**  
crm2013beta

Specify the location of the AD DS database, log files, and SYSVOL

Deployment Configuration

Domain Controller Options

DNS Options

Additional Options

**Paths**

Review Options

Prerequisites Check

Installation

Results

Database folder: C:\Windows\NTDS

Log files folder: C:\Windows\NTDS

SYSVOL folder: C:\Windows\SYSVOL

[More about Active Directory paths](#)

< Previous Next > Install Cancel

Accept the default locations for AD DS database, log files and SYSVOL, because we're not building a production domain here.

**SERVICES**

All services | 12 total

Filter				
Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



- Dashboard
- Local Server
- All Servers
- AD DS
- File and Storage

**SERVICES**  
All servers | 1 total

### Active Directory Domain Services Configuration Wizard

TARGET SERVER  
crm2013beta

## Review Options

Deployment Configuration

Domain Controller Options

DNS Options

Additional Options

Paths

**Review Options**

Prerequisites Check

Installation

Results

Review your selections:

Configure this server as the first Active Directory domain controller in a new forest.

The new domain name is "GLOBAL.local". This is also the name of the new forest.

The NetBIOS name of the domain: GLOBAL

Forest Functional Level: Windows Server 2012

Domain Functional Level: Windows Server 2012

Additional Options:

Global catalog: Yes

DNS Server: Yes

Create DNS Delegation: No

These settings can be exported to a Windows PowerShell script to automate additional installations

[View script](#)

[More about installation options](#)

< Previous Next > Install Cancel

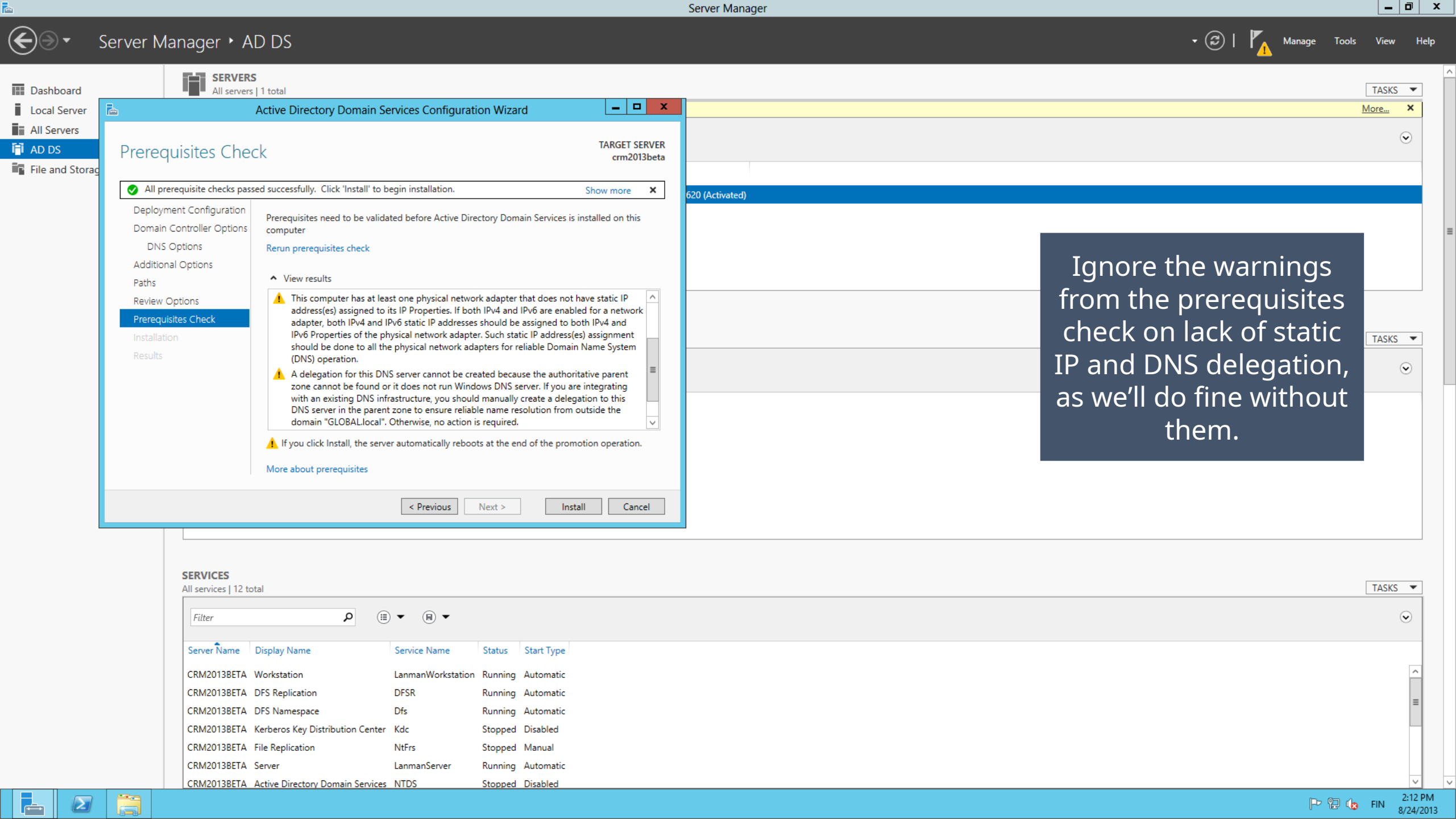
Everything is ready for the domain services configuration, so accept the options shown.

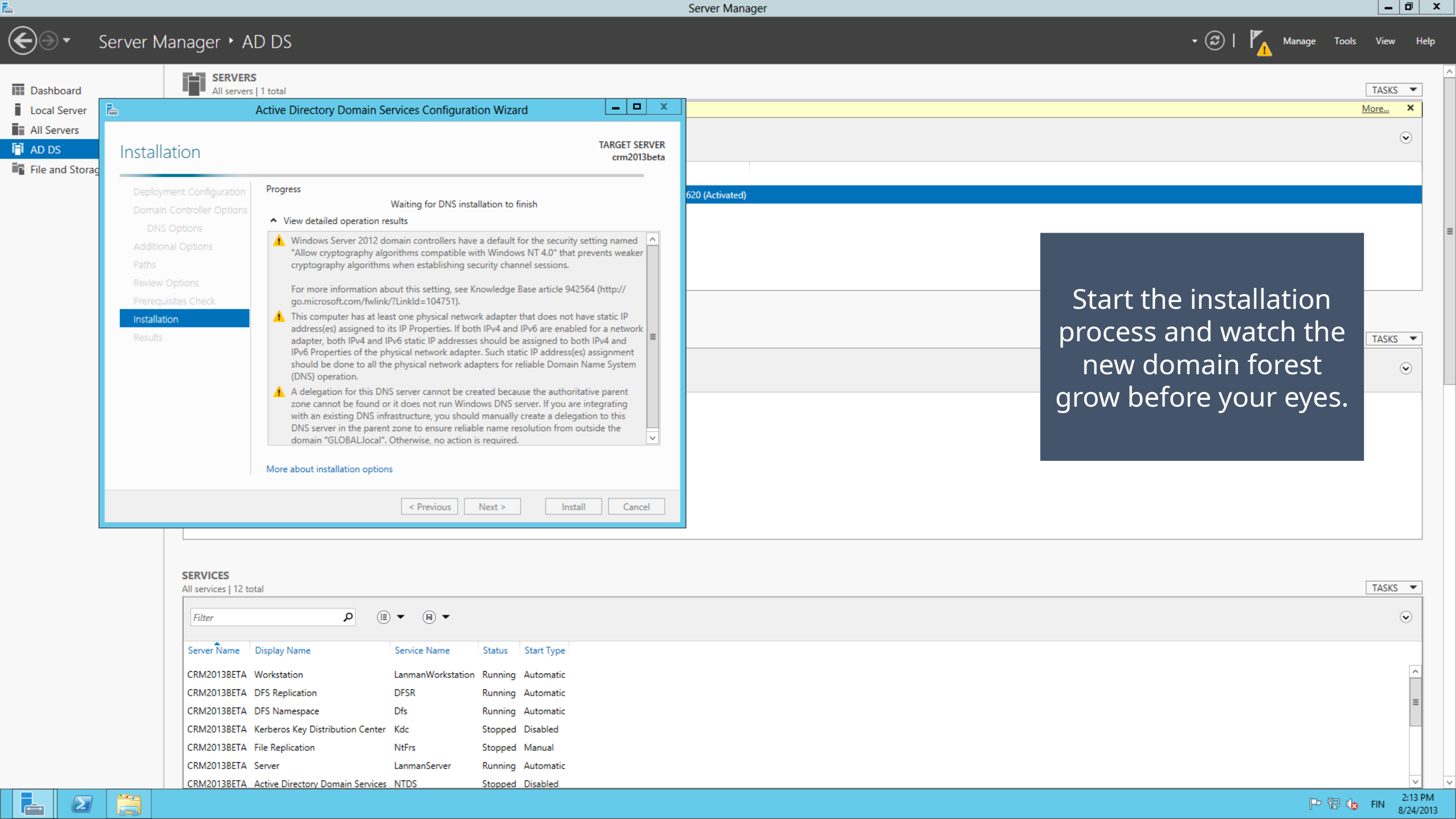
**SERVICES**

All services | 12 total

Filter				
Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
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CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled







## Active Directory Domain Services Configuration Wizard

## Installation

TARGET SERVER  
crm2013betaDeployment Configuration  
Domain Controller Options  
DNS Options  
Additional Options  
Paths  
Review Options  
Prerequisites Check  
Installation  
Results

## Progress

Waiting for DNS installation to finish

## View detailed operation results

⚠ Windows Server 2012 domain controllers have a default for the security setting named "Allow cryptography algorithms compatible with Windows NT 4.0" that prevents weaker cryptography algorithms when establishing security channel sessions.

For more information about this setting, see Knowledge Base article 942564 (<http://go.microsoft.com/fwlink/?LinkId=104751>).

⚠ This computer has at least one physical network adapter that does not have static IP address(es) assigned to its IP Properties. If both IPv4 and IPv6 are enabled for a network adapter, both IPv4 and IPv6 static IP addresses should be assigned to both IPv4 and IPv6 Properties of the physical network adapter. Such static IP address(es) assignment should be done to all the physical network adapters for reliable Domain Name System (DNS) operation.

⚠ A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found or it does not run Windows DNS server. If you are integrating with an existing DNS infrastructure, you should manually create a delegation to this DNS server in the parent zone to ensure reliable name resolution from outside the domain "GLOBAL.local". Otherwise, no action is required.

[More about installation options](#)

&lt; Previous

Next &gt;

Install

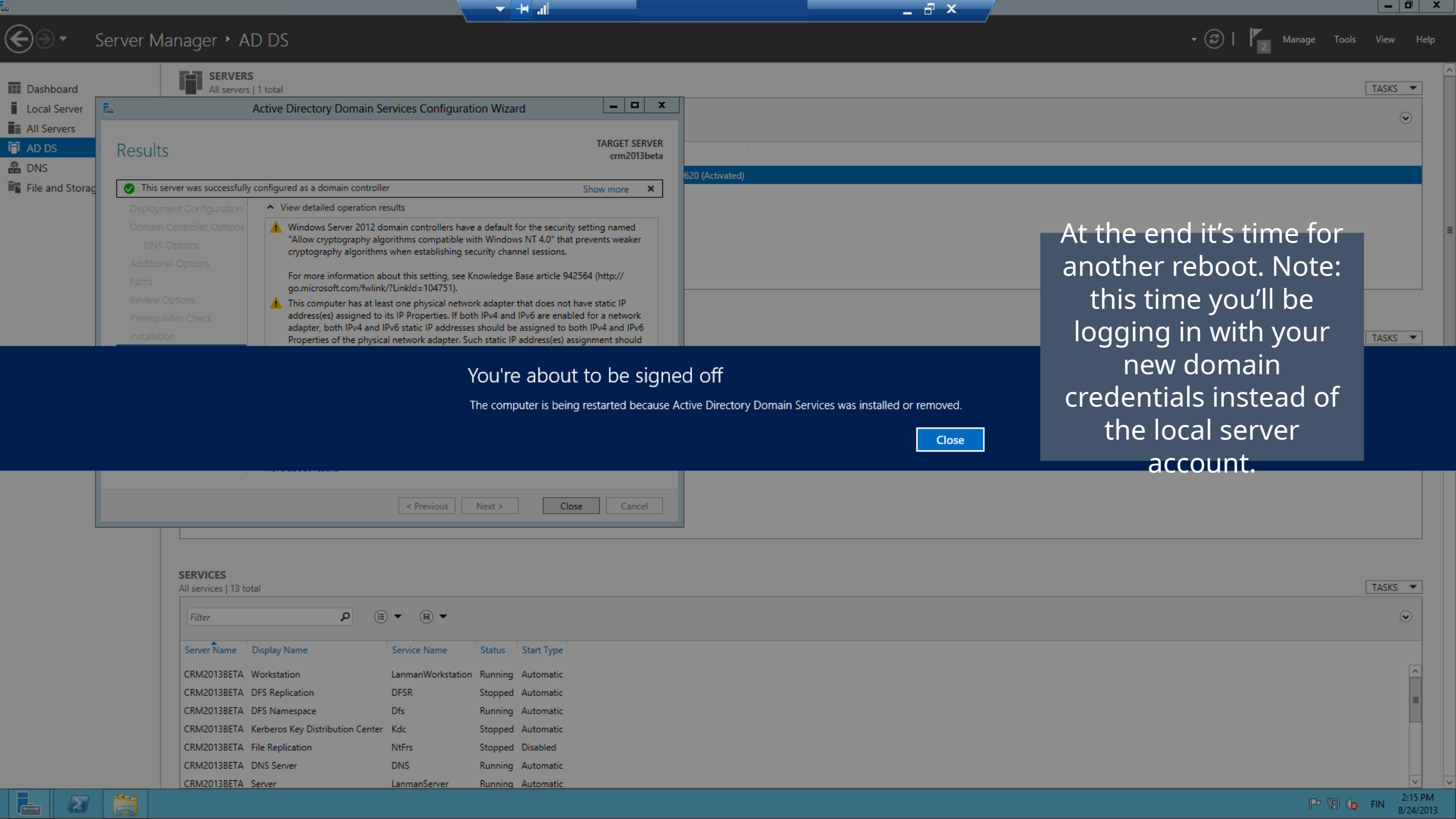
Cancel

Start the installation  
process and watch the  
new domain forest  
grow before your eyes.

## SERVICES

All services | 12 total

Filter				
Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled



**SERVICES**  
All services | 13 total

Active Directory Domain Services Configuration Wizard

Results

TARGET SERVER  
crm2013beta

✓ This server was successfully configured as a domain controller

Show more

Deployment Configuration

View detailed operation results

Domain Controller Options

⚠ Windows Server 2012 domain controllers have a default for the security setting named "Allow cryptography algorithms compatible with Windows NT 4.0" that prevents weaker cryptography algorithms when establishing security channel sessions.

For more information about this setting, see Knowledge Base article 942564 (<http://go.microsoft.com/fwlink/?LinkId=104751>).

⚠ This computer has at least one physical network adapter that does not have static IP address(es) assigned to its IP Properties. If both IPv4 and IPv6 are enabled for a network adapter, both IPv4 and IPv6 static IP addresses should be assigned to both IPv4 and IPv6 Properties of the physical network adapter. Such static IP address(es) assignment should

You're about to be signed off

The computer is being restarted because Active Directory Domain Services was installed or removed.

Close

At the end it's time for another reboot. Note: this time you'll be logging in with your new domain credentials instead of the local server account.

**SERVICES**

All services | 13 total

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Stopped	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Automatic
CRM2013BETA	File Replication	NtFrs	Stopped	Disabled
CRM2013BETA	DNS Server	DNS	Running	Automatic
CRM2013BETA	Server	LanmanServer	Running	Automatic

- Dashboard
- Local Server
- All Servers
- AD DS
- DNS
- File and Storage Services

WELCOME TO SERVER MANAGER

1

Configure this local server

Local Server

1

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

All Servers

1

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

Return to Server Manager and add more roles. Check Application Server, Web Server (IIS) and accept all the related components to be added.

Add Roles and Features Wizard

DESTINATION SERVER  
crm2013beta.GLOBAL.local

Select server roles

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Application Server

Role Services

Web Server Role (IIS)

Role Services

Confirmation

Results

Select one or more roles to install on the selected server.

Roles

☐ Active Directory Rights Management Services

☒ Application Server

☐ DHCP Server

☒ DNS Server (Installed)

☐ Fax Server

☒ File And Storage Services (Installed)

☐ Hyper-V

☐ Network Policy and Access Services

☐ Print and Document Services

☐ Remote Access

☐ Remote Desktop Services

☐ Volume Activation Services

☒ Web Server (IIS)

☐ Windows Deployment Services

☐ Windows Server Update Services

Description

Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.

< Previous

Next >

Install

Cancel

Dashboard

Local Server

All Servers

AD DS

DNS

File and

WELCOME TO SERVER MANAGER

1 Configure this local server

DESTINATION SERVER  
crm2013beta.GLOBAL.local

Select features

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Application Server

Role Services

Web Server Role (IIS)

Role Services

Confirmation

Results

Select one or more features to install on the selected server.

Features	Description
<input checked="" type="checkbox"/> .NET Framework 3.5 Features (Installed)	<p>.NET Framework 3.5 combines the power of the .NET Framework 2.0 APIs with new technologies for building applications that offer appealing user interfaces, protect your customers' personal identity information, enable seamless and secure communication, and provide the ability to model a range of business processes.</p>
<input checked="" type="checkbox"/> .NET Framework 4.5 Features (Installed)	
<input type="checkbox"/> Background Intelligent Transfer Service (BITS)	
<input type="checkbox"/> BitLocker Drive Encryption	
<input type="checkbox"/> BitLocker Network Unlock	
<input type="checkbox"/> BranchCache	
<input type="checkbox"/> Client for NFS	
<input type="checkbox"/> Data Center Bridging	
<input type="checkbox"/> Enhanced Storage	
<input type="checkbox"/> Failover Clustering	
<input checked="" type="checkbox"/> Group Policy Management (Installed)	
<input type="checkbox"/> Ink and Handwriting Services	
<input type="checkbox"/> Internet Printing Client	
<input type="checkbox"/> IP Address Management (IPAM) Server	
<input type="checkbox"/> ...	

< Previous Next > Install Cancel

Local Server 1

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

All Servers

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

No need for additional features, click Next.

Hide

2

FIN

2:21 PM  
8/24/2013

Dashboard

Local Server

All Servers

AD DS

DNS

File and

WELCOME TO SERVER MANAGER

1

Configure this local server

Add Roles and Features Wizard

Select role services

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Application Server

Web Server Role (IIS)

Role Services

Confirmation

Results

Role services

☒ .NET Framework 4.5

☐ COM+ Network Access

☐ Distributed Transactions

☐ WS-Atomic Transactions

☐ Incoming Network Transactions

☐ Outgoing Network Transactions

☐ TCP Port Sharing

☒ Web Server (IIS) Support

☒ Windows Process Activation Service Support

☒ HTTP Activation

☐ Message Queuing Activation

☐ Named Pipes Activation

☐ TCP Activation

DESCRIPTION

DESTINATION SERVER

crm2013beta.GLOBAL.local

HTTP Activation supports process activation via HTTP. Applications that use HTTP Activation can start and stop dynamically in response to work items that arrive over the network via HTTP.

< Previous

Next >

Install

Cancel

Local Server

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

All Servers

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

For the Application Server roles, select .NET Framework 4.5, Web Server (IIS) Support, HTTP Activation.

Hide

FIN

2:24 PM

8/24/2013

Dashboard

Local Server

All Servers

AD DS

DNS

File and

WELCOME TO SERVER MANAGER

1

Configure this local server

Select role services

DESTINATION SERVER  
crm2013beta.GLOBAL.local

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Application Server

Role Services

Web Server Role (IIS)

Role Services

Confirmation

Results

Select the role services to install for Web Server (IIS)

Role services

☒ IIS Client Certificate Mapping Authentication

☒ IP and Domain Restrictions

☒ URL Authorization

☒ Windows Authentication

☒ Application Development

☐ FTP Server

☐ FTP Service

☐ FTP Extensibility

☐ IIS Hostable Web Core

☒ Management Tools

☒ IIS Management Console

☐ IIS 6 Management Compatibility

☒ IIS Management Scripts and Tools

☒ Management Service

Description

Management Service allows the Web server to be managed remotely from another computer using IIS Manager.

< Previous

Next >

Install

Cancel

Local Server

1

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

All Servers

1

Manageability

Events

5 Services

Performance

BPA results

8/24/2013 2:19 PM

For the IIS roles, select Management Services and ensure the other boxes are ticked as shown.

Hide

2

3

4

5

6

7

8

9

10

11

12

2:25 PM

8/24/2013

## Dashboard

- Local Server
- All Servers
- AD DS
- App Server
- DNS
- File and Storage Services
- IIS

## WELCOME TO SERVER MANAGER

1 Configure this local server

Add Roles and Features Wizard

Installation progress

DESTINATION SERVER  
crm2013beta.GLOBAL.local

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Application Server

Role Services

Web Server Role (IIS)

Role Services

Confirmation

Results

View installation progress

Feature installation

Installation succeeded on crm2013beta.GLOBAL.local.

.NET Framework 4.5 Features

- WCF Services
- HTTP Activation
- ASP.NET 4.5

Application Server

- .NET Framework 4.5
- Web Server (IIS) Support
- Windows Process Activation Service Support
- HTTP Activation

Web Server (IIS)

- Web Server

You can close this wizard without interrupting running tasks. View task progress or open this page again by clicking Notifications in the command bar, and then Task Details.

Export configuration settings

< Previous Next > Close Cancel

Start the installation, watch it run and see two new roles appear in the Server Manager.

All Servers 1

Manageability

- Events

Services

- Performance
- BPA results

8/24/2013 2:29 PM

File and Storage Services 1

Manageability

- Events
- Services
- Performance
- BPA results

IIS

Manageability

- Events
- Services
- Performance
- BPA results

Services

- Performance
- BPA results

8/24/2013 2:29 PM



Active Directory Administrative Center

GLOBAL (local) ▸ Users

Active Directory... Users (24)

Filter

Name	Type	Description
Allowed RODC Password Replication Group	Group	Members in this group can...
Cert Publishers	Group	Members of this group ar...
Cloneable Domain Control...	Group	Members of this group th...
Denied RODC Password R...	Group	Members in this group ca...
DnsAdmins	Group	DNS Administrators Group
DnsUpdateProxy	Group	DNS clients who are permi...
Domain Admins	Group	Designated administrators...
Domain Computers	Group	All workstations and serve...
Domain Controllers	Group	All domain controllers in t...
Domain Guests	Group	All domain guests
Domain Users	Group	All domain users
Enterprise Admins	Group	Designated administrators...
Enterprise Read-only Dom...	Group	Members of this group ar...

Allowed RODC Password Replication Group

E-mail: Type: Security  
Managed by: Scope: Domain local  
Modified: 8/24/2013 2:16 PM  
Description: Members in this group can have their passwords replicated to all read-only domain controllers in the domain

Summary

Tasks

- Allowed RODC Password Replica...
- Add to another group...
- Delete
- Move...
- Properties

Users

- New
- Delete
- Search under this node
- Properties

Next we'll add some items into the domain. Open Active Directory Administrative Center and create a new user record.

## WINDOWS POWERSHELL HISTORY

CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Running	Automatic
CRM2013BETA	File Replication	NtFrs	Stopped	Disabled
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic

Active Directory Administrative Center

GLOBAL (local) ▸ Users

Active Directory... < Users (24)

Filter

Name	Type	Description
Allowed RODC Password Replication Group	Group	Members in this group can...
Cert Publishers	Group	Members of this group ar...
Cross-Realm Domain Control...	Group	Members of this group th...

Tasks

- Allowed RODC Password Replica...
- Add to another group...
- Delete
- Move...
- Properties

## Create User: CRM Admin

## Account

Organization

Member Of

Password Settings

Profile

## Account

First name: CRM  
Middle initials:  
Last name: Admin  
Full name: \* CRM Admin  
User UPN login: @  
User SamAccountName: GLOBAL \\* crm.admin

Password:  
Confirm password:  
Create in: CN=Users,DC=GLOBAL,DC=local Change...

☐ Protect from accidental deletion

Log on hours... Log on to...

Account expires: ☒ Never  
☐ End of

## Password options:

☐ User must change password at next log on  
☒ Other password options  
☐ Smart card is required for interactive logon  
☒ Password never expires  
☐ User cannot change password

## Encryption options:

Other options:

## Organization

Display name: CRM Admin Job title:  
Office: Department:  
E-mail: Company:  
Web page: Manager: Edit... Clear  
Direct reports:

Other web pages...

More Information

OK

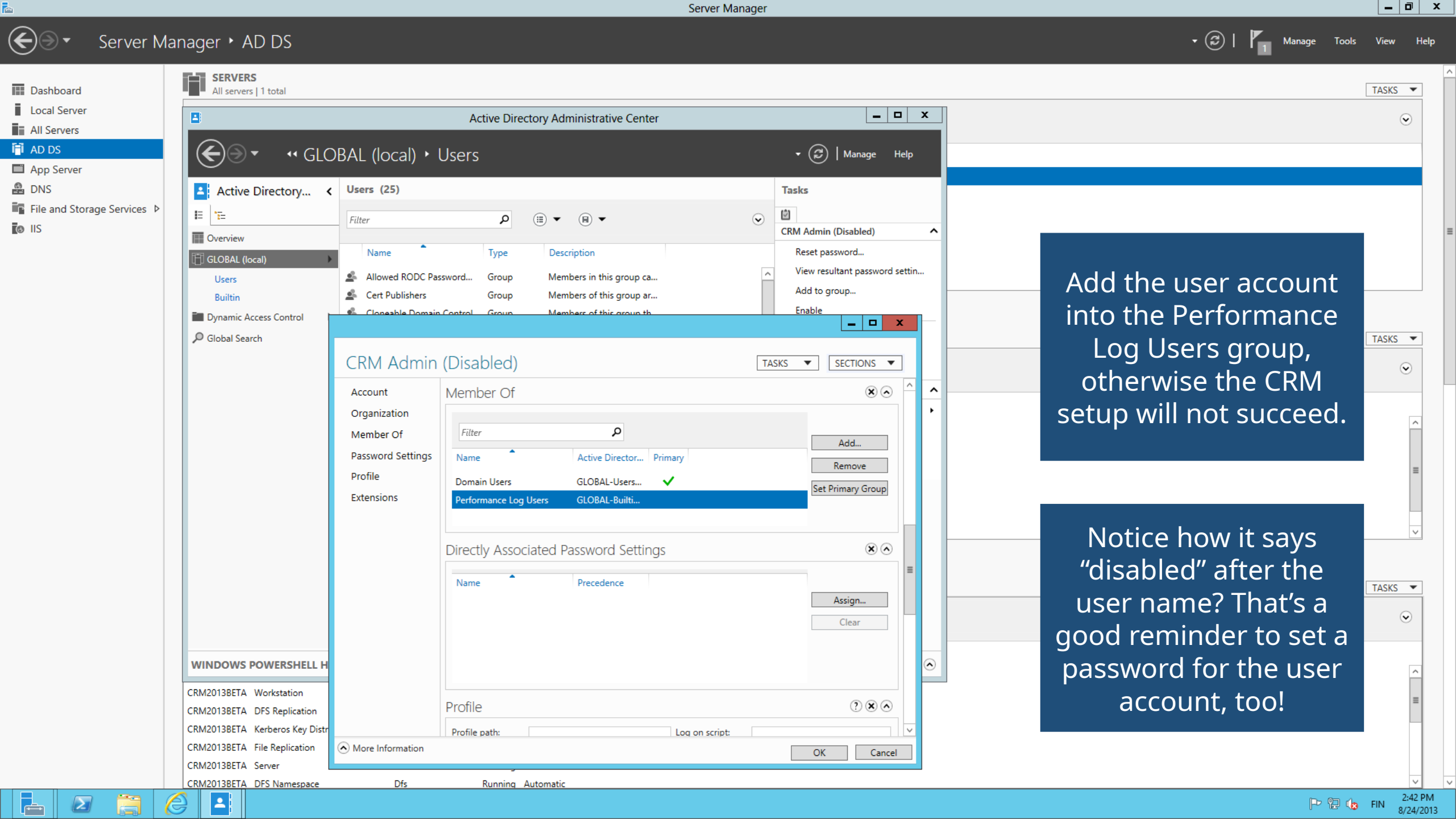
Cancel

Create a user account that will run the CRM services. Remember to check the "password never expires" option.

## WINDOWS POWERSHELL H

CRM2013BETA Workstation  
CRM2013BETA DFS Replication  
CRM2013BETA Kerberos Key Distr  
CRM2013BETA File Replication  
CRM2013BETA Server  
CRM2013BETA DFS Namespace

Dfs Running Automatic



**SERVICES**  
All servers | 1 total

Active Directory Administrative Center

GLOBAL (local) ▸ Users

Active Directory... < Users (25)

Filter

Name	Type	Description
Allowed RODC Password...	Group	Members in this group ca...
Cert Publishers	Group	Members of this group ar...
Cleanable Domain Control	Group	Members of this group th...

Tasks

- CRM Admin (Disabled)
- Reset password...
- View resultant password settin...
- Add to group...
- Enable

CRM Admin (Disabled)

Account

Organization

Member Of

Password Settings

Profile

Extensions

Member Of

Filter

Name	Active Director...	Primary
Domain Users	GLOBAL-Users...	✓
Performance Log Users	GLOBAL-Builti...	

Add...

Remove

Set Primary Group

Directly Associated Password Settings

Name	Precedence
------	------------

Assign...

Clear

Profile

Profile path:

Log on script:

More Information

OK Cancel

Add the user account into the Performance Log Users group, otherwise the CRM setup will not succeed.

Notice how it says "disabled" after the user name? That's a good reminder to set a password for the user account, too!

**WINDOWS POWERSHELL H**

CRM2013BETA Workstation

CRM2013BETA DFS Replication

CRM2013BETA Kerberos Key Distr

CRM2013BETA File Replication

CRM2013BETA Server

CRM2013BETA DFS Namespace

Dfs Running Automatic



Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...

Active Directory Administrative Center

Active Directory Administrative Center ▸ GLOBAL (local) ▸

Active Directory... < GLOBAL (local) (12)

Filter

Name	Type	Description
Builtin	builtinDom...	
Computers	Container	Default container for upgr...
Domain Controllers	Organizati...	Default container for dom...
ForeignSecurityPrincipals	Container	Default container for secur...
Infrastructure	infrastructu...	
LostAndFound	lostAndFou...	Default container for orph...
Managed Service Accounts	Container	Default container for man...
NTDS Quotas	msDS-Quo...	Quota specifications conta...
Program Data	Container	Default location for storag...
System	Container	Builtin system settings
TPM Devices	msTPM-Inf...	
Users	Container	Default container for upgr...

Tasks

GLOBAL (local)

- Change domain controller
- Raise the forest functional leve...
- Raise the domain functional le...
- Enable Recycle Bin ...
- New ▸
  - Search under this node
  - Properties

WINDOWS POWERSHELL HISTORY

While remaining in the  
AD Admin Center,  
create a new  
Organizational Unit.

Windows Server 2012





Recycle Bin



SQL Server - Getting started



IIS\_Deploy

Active Directory Administrative Center

Active Directory Administrative Center > GLOBAL (local)

GLOBAL (local) (12)

Name	Type	Description
Builtin	builtinDom...	
Computers	Container	Default container for upgr...
Domain Controllers	Organizati...	Default container for dom...

Create Organizational Unit: CRM

Organizational Unit

Managed By

Name: \* CRM Create in: DC=GLOBAL,DC=local

Address: Street

City State/Prov... Zip/Postal... Country/Region:

Description:

☒ Protect from accidental deleti...

Managed By

Managed by: Edit... Clear Office:

Phone numbe Main: Mobile: Fax:

Address: Street City State/Pr... Zip/Post... Country/Region:

More Information

OK Cancel

Give the OU a name like "CRM". This is the place where the CRM setup will add its specific AD security groups.

Windows Server 2012





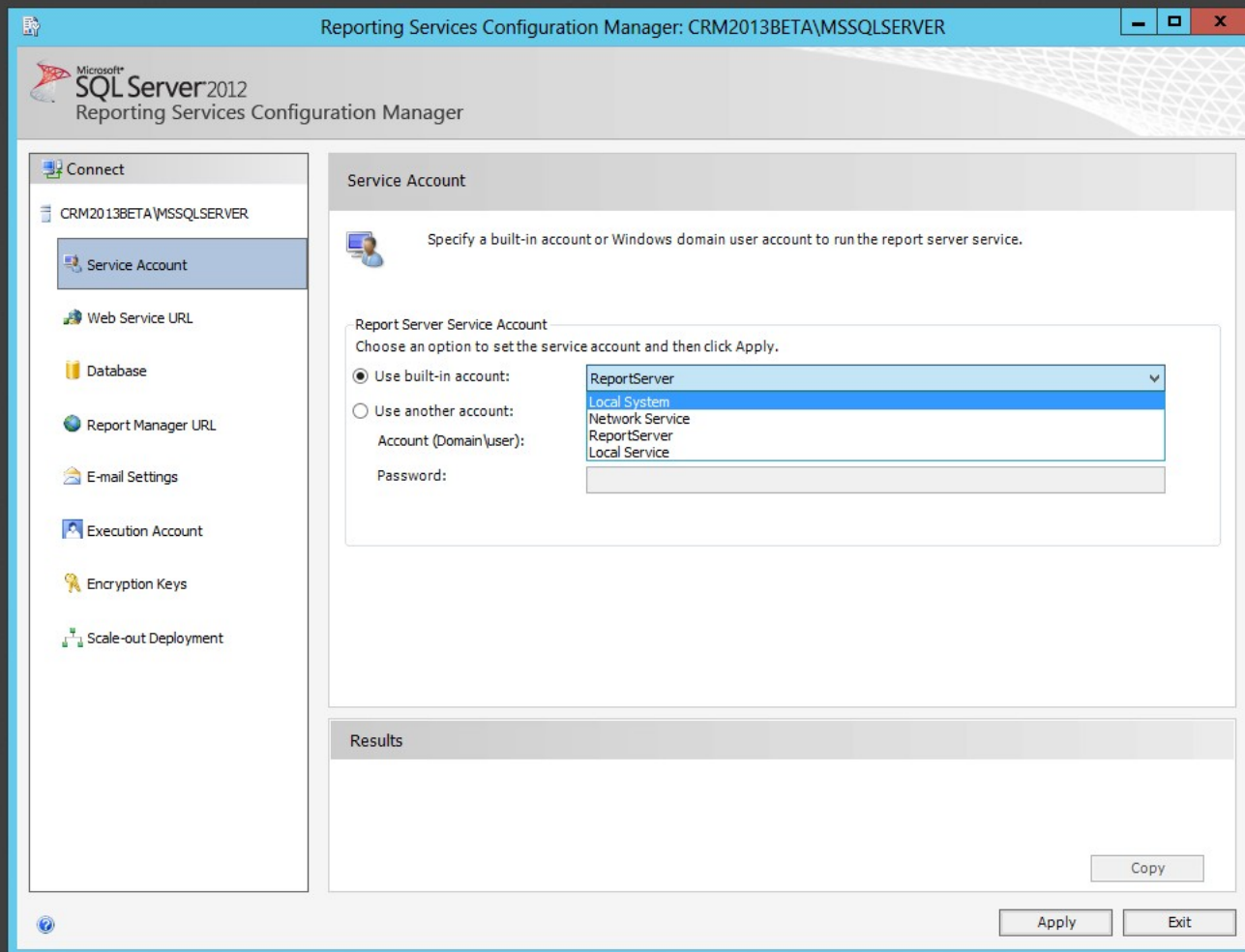
Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...



Reporting Services comes installed on the Azure SQL 2012 Enterprise image, but we'll still need to perform a few configuration steps. Open the Reporting Services Configuration Manager and connect to the local server

On the Service Account tab, change the account to Local System, since using the ReportServer local account is not supported by CRM.





Reporting Services Configuration Manager: CRM2013BETA\MSSQLSERVER

Microsoft SQL Server 2012  
Reporting Services Configuration Manager

Connect

- CRM2013BETA\MSSQLSERVER
- Service Account
- Web Service URL**
- Database
- Report Manager URL
- E-mail Settings
- Execution Account
- Encryption Keys
- Scale-out Deployment

Web Service URL

Configure a URL used to access the Report Server. Click Advanced to define multiple URLs for a single Report Server instance, or to specify additional parameters on the URL.

Report Server Web Service Virtual Directory

Virtual Directory: ReportServer

Report Server Web Service Site identification

IP Address: All Assigned (Recommended)

TCP Port: 80

SSL Certificate: (Not Selected)

SSL Port:

Advanced...

Report Server Web Service URLs

URLs: <http://CRM2013BETA:80/ReportServer>

Results

- ✓ Creating virtual directory ReportServer
- ✓ Reserving url http://+:80

The url was successfully reserved.

Copy

Apply Exit

Proceed to the Web Service URL tab. Click Apply to create the IIS directory with default settings.

Reporting Services Configuration Manager: CRM2013BETA\MSSQLSERVER

Microsoft SQL Server 2012  
Reporting Services Configuration Manager

Connect

- CRM2013BETA\MSSQLSERVER
- Service Account
- Web Service URL
- Database**
- Report Manager URL
- E-mail Settings
- Execution Account
- Encryption Keys
- Scale-out Deployment

Report Server Database

Reporting Services stores all report server content and application data in a database. Use this page to create or change the report server database or update database connection credentials.

Current Report Server Database

Click Change database to select a different database or create a new database in native or SharePoint integrated mode.

SQL Server Name:	CRM2013BETA
Database Name:	ReportServer
Report Server Mode:	Native

Change Database

Current Report Server Database Credential

The following credentials are used by the report server to connect to the report server database. Use the options below to choose a different account or update a password.

Credential:	Service Account
Login:	NT Service\ReportServer
Password:	*****

Change Credentials

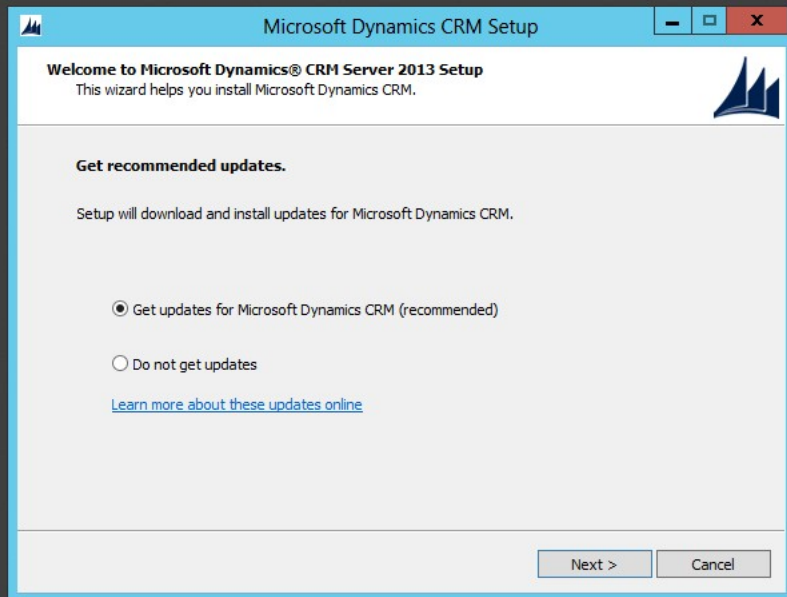
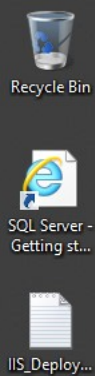
Results

Copy

Apply Exit

On the Database tab click Change Database and use the defaults to create a new Report Server Database. Now we're ready with the SSRS configuration part.





Launch the CRM Server setup, give a path for installation file extraction, then allow the setup to check for updates to those files before proceeding further.

 Windows Server 2012





Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...

Microsoft Dynamics CRM Setup

**Product Key Information**  
Enter a product key.

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

Product key:

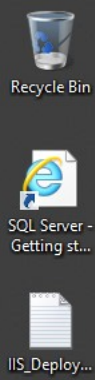
The product key that you entered is for a trial version of Microsoft Dynamics CRM. In 90 days, the trial period will expire and you will no longer be able to run the program. You must upgrade to a full version to continue using the program.

Next > Cancel

Enter the CRM product key, either a 90 day trial or MSDN full product key. Note: do not use the Workgroup Edition, always go for Enterprise.

 Windows Server 2012





**Microsoft Dynamics CRM Setup**

**Download and Install Required Components**

To download and install the listed required components, click Install. Then, click Next.

Component	Status	Message
➡ Microsoft Application Error Reporting	Installing	
➡ Microsoft SQL Reporting Service Report ...	Downloaded	Minimum version required: 10.0...
➡ SQL Native Client	Downloaded	Minimum version required: 10.1....

Installing Microsoft Application Error Reporting...

The setup will detect missing required components for error reporting, SSRS and SQL Native Client. Allow it to install the components.

Microsoft Dynamics CRM Setup

### Specify Server Roles

Specify the server roles that you want to add or remove on this computer.

**Roles:**

- ☒ Full Server
  - ☒ Front End Server
    - ☒ Web Application Server
    - ☒ Organization Web Service
    - ☒ Discovery Web Service
    - ☒ Help Server
  - ☒ Back End Server
    - ☒ Asynchronous Processing Service
    - ☒ Email Integration Service
    - ☒ Sandbox Processing Service
  - ☒ Deployment Administration Server
    - ☒ Deployment Tools
    - ☒ Deployment Web Service
    - ☒ VSS Writer Service

[More information about roles](#)

**Description:**

The Full Server role group is the default server configuration that includes all Microsoft Dynamics CRM server roles on this computer.

< Back   Next >   Cancel

Since we're building a single box development environment, select all the available CRM server roles for this installation.



Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...

Microsoft Dynamics CRM Setup

### Specify Deployment Options

Specify the Microsoft Dynamics CRM deployment and the computer that is running SQL Server.

Create or connect to a deployment:

☒ Create a new deployment

☐ Connect to, and if necessary, upgrade an existing deployment

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

cm2013beta

< Back Next > Cancel

Select "Create a new deployment" and enter the name of your server as the SQL Server instance to be used.

Windows Server 2012





Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...

Microsoft Dynamics CRM Setup

### Select the Organizational Unit

Select the organizational unit for your organization.

Select an Active Directory organizational unit (OU) to contain the Microsoft Dynamics CRM System Groups. This OU must be in the same domain as this Microsoft Dynamics CRM deployment.

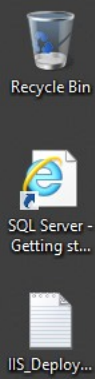
Organizational unit:

Browse and select the  
Active Directory  
Organization Unit (OU)  
you created in an  
earlier stage.

 Windows Server 2012







Microsoft Dynamics CRM Setup

Specify Service Accounts

Specify the service accounts for the Microsoft Dynamics CRM services.

We recommend that you specify a different least-privileged account for each service.

When you specify a domain user account, verify the service principal name (SPN) for each domain account. For more information, see [Verify Service Principal Name for Microsoft Dynamics CRM service accounts](#).

Service	Account Name	Password
Application Service	GLOBAL\CRM.ADMIN	*****
Deployment Web Service	GLOBAL\CRM.ADMIN	*****
Sandbox Processing Service	GLOBAL\CRM.ADMIN	*****
VSS Writer Service	GLOBAL\CRM.ADMIN	*****
Asynchronous Processing Ser...	GLOBAL\CRM.ADMIN	*****
Monitoring Service	GLOBAL\CRM.ADMIN	*****

< Back

Next >

Cancel

Enter the account name and credentials for all the service accounts required. In a development environment the same account can be used for all services.



Microsoft Dynamics CRM Setup

### Select Website

Select a Website for the Webcomponents.

We recommend that you select a Website that has an HTTPS binding.

☐ Select a Website

Default Web Site

☒ Create new Website

Port Number: 5555

< Back Next > Cancel

Create a new website for CRM at port 5555, in case you ever need to work with other services that require using the default web site (like ADFS)

Windows Server 2012







Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...

Microsoft Dynamics CRM Setup

### Specify Email Router Settings

Specify the email router to use when email is sent and received. This is an optional step.

Email router server name:

To use the Email Router to process email, type the Email Router server name. Or, you can do this later by adding the Email Router computer name to the PrivUserGroup security group in Active Directory. If you want to use server-side synchronization for email processing, skip this step.


< Back   Next >   Cancel

Unless you plan to have the development server send out emails into the real world, leave the email router server name blank.




Windows Server 2012








# Microsoft Dynamics CRM Setup



## Specify the Organization Settings

Specify settings for your organization for this deployment of Microsoft Dynamics CRM.



Display name:

Unique Database Name:

Select the base currency for this organization. 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.

ISO currency code:


Currency name:

Currency symbol:

Currency precision:

Select the SQL collation for this organization. The collation defines comparison and sort-ordering for items. After the collation is set, it cannot be changed.

SQL Collation:

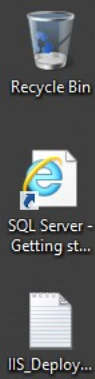






< Back

Next >

Cancel


Choose your preferred organization settings for the first (default) CRM organization. Remember that you can always add more organizations after the installation is done.



Microsoft Dynamics CRM Setup

## Specify Reporting Services Server

Specify an existing SQL Server Reporting Services Report Server URL.



Report Server URL:

Make sure to specify the Report Server URL and not the Report Manager URL.  
Example: http://Host/ReportServer.

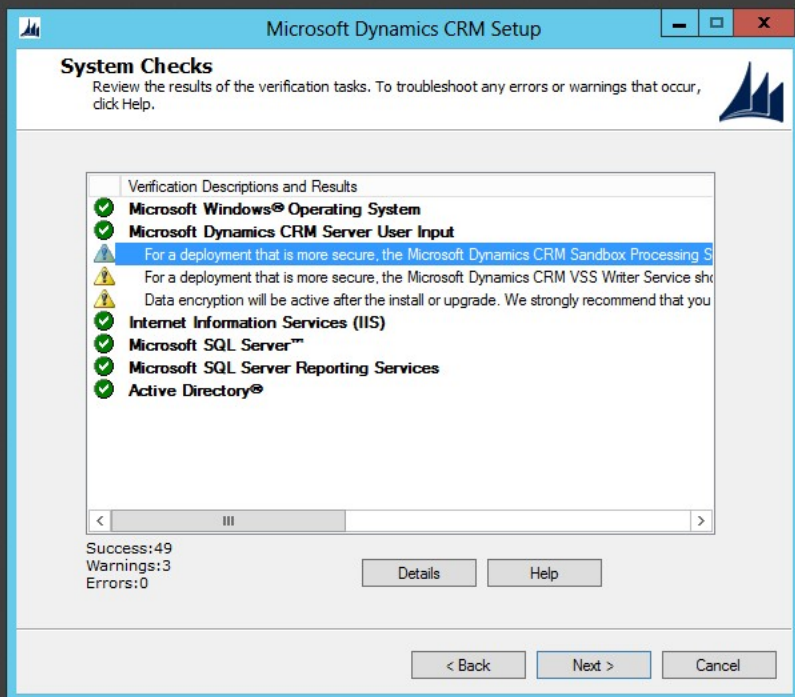
For the reports to work, you must install Microsoft Dynamics CRM Reporting Extensions for SQL Server Reporting Services.

< Back

Next >

Cancel

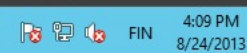
If you are using the default settings for SSRS, the Report Server URL offered by the setup should be correct. If in doubt, test the URL in a browser window.



The system checks will give you warnings on security and encryption, which you can ignore in this case. Now we're ready to start the CRM server installation.



If everything went according to plan, you'll see the "setup completed" screen in some 10 minutes. Restart the server.





Recycle Bin



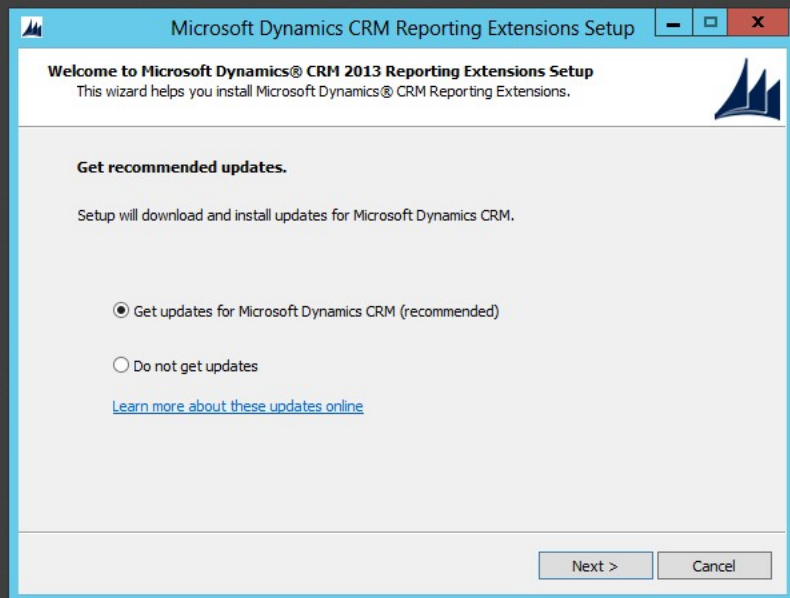
SQL Server -  
Getting st...



CRM\_Org1...



IIS\_Deploy...



Run the setup for CRM  
Reporting Extensions.  
As before, allow the  
setup to retrieve latest  
updates from the web.

 Windows Server 2012





Recycle Bin



SQL Server -  
Getting st...



CRM\_Org1...



IIS\_Deploy...

Microsoft Dynamics CRM Reporting Extensions Setup

### Specify Configuration Database Server

Specify the Microsoft® SQL Server™ that stores the configuration database.

Type the name of the computer that is running SQL Server and stores the configuration database.

SQL Server:

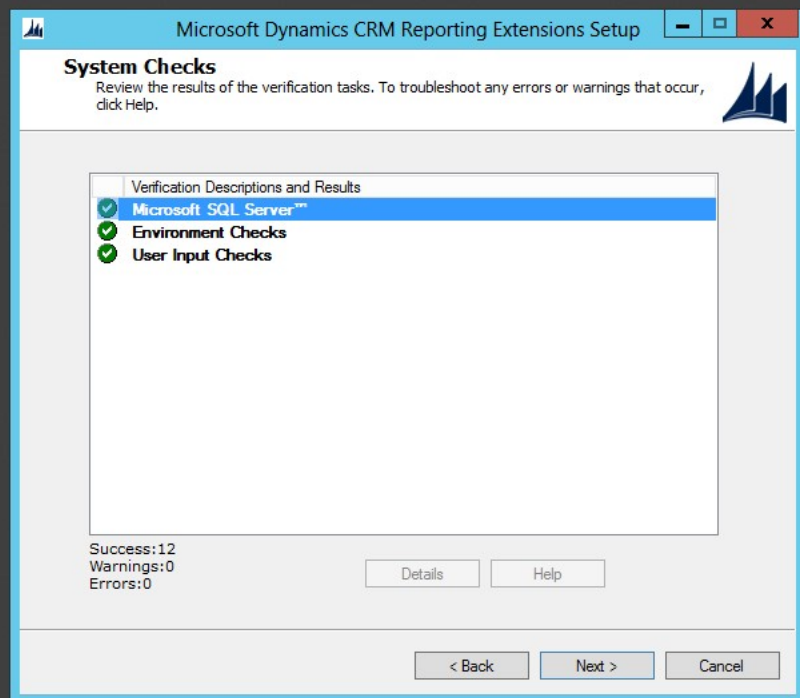
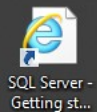
crm2013beta

< Back Next > Cancel

Enter the server name  
as the SQL Server  
instance to which the  
reports will be  
deployed on.

Windows Server 2012





System checks should give you all green at this point. Start the installation.

 Windows Server 2012





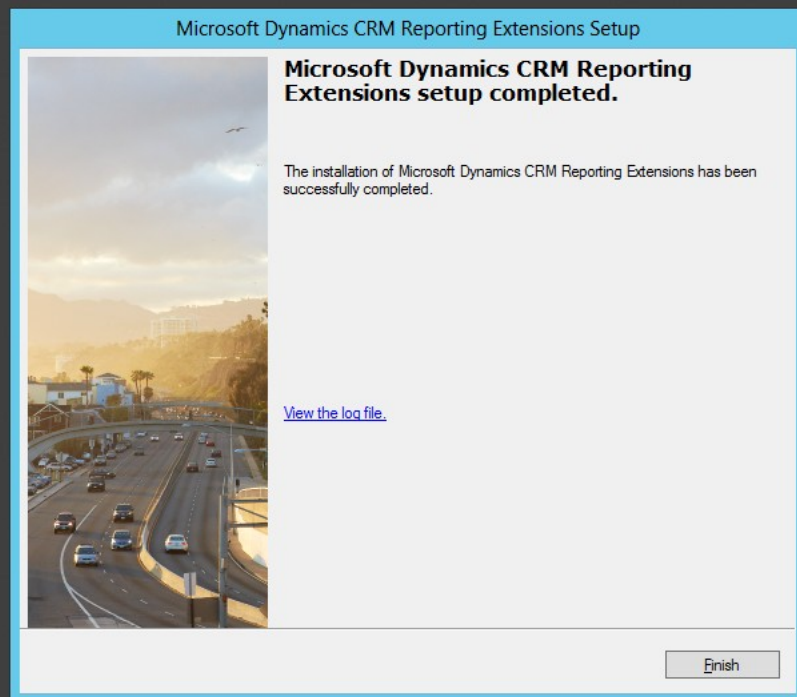
Recycle Bin



SQL Server -  
Getting st...



IIS\_Deploy...



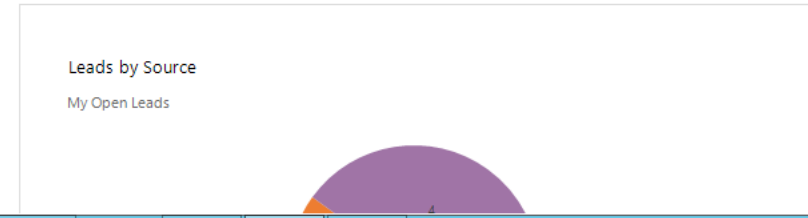
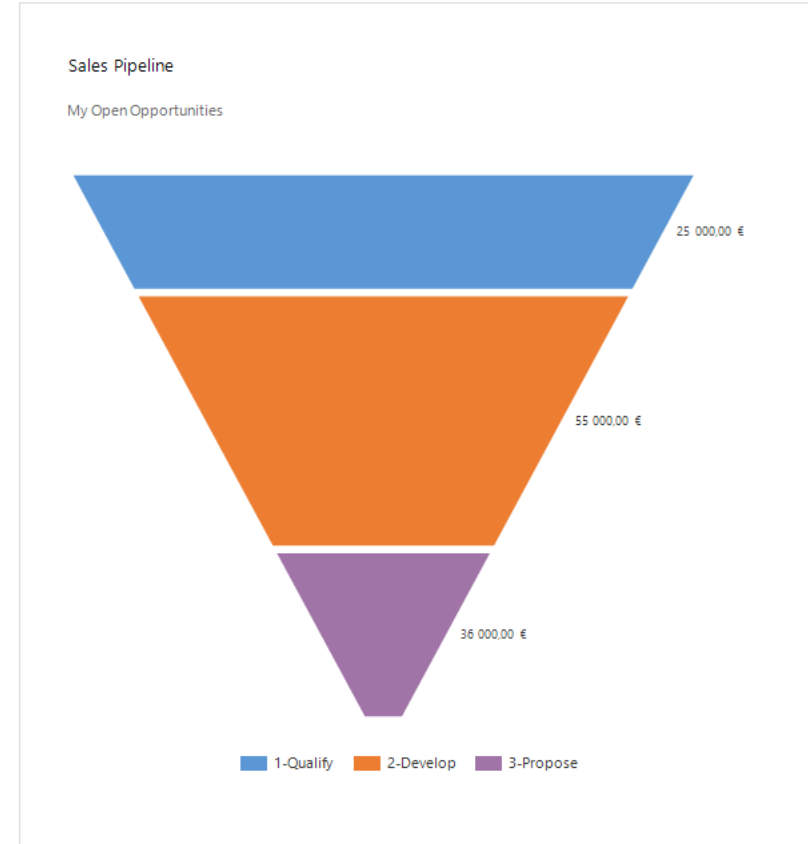
After some minutes of  
deploying the default  
reports onto the first  
CRM organization the  
setup will complete.

 Windows Server 2012



SAVE AS NEW SET AS DEFAULT REFRESH ALL ADVANCED FIND

Sales Activity Social Dashboard



### what's new

POST

All records | Both Auto posts User posts

- Delivery never arrived (sample)**  
Case: Closed by First name Last name for Account Alpine Ski House (sample).  
On Delivery never arrived (sample)'s wall  
Today 24.8.2013 16:20
- Operating manual required (sample)**  
Case: Closed by First name Last name for Account A. Datum Corporation (sample).  
On Operating manual required (sample)'s wall  
Today 24.8.2013 16:20
- Product catalog requested (sample)**  
Case: Closed by First name Last name for Account Fourth Coffee (sample).  
On Product catalog requested (sample)'s wall  
Today 24.8.2013 16:20
- Product damaged (sample)**  
Case: Closed by First name Last name for Account Litware, Inc. (sample).  
On Product damaged (sample)'s wall  
Today 24.8.2013 16:20
- Product information required (sample)**  
Case: Closed by First name Last name for Account Coho Winery (sample).  
On Product information required (sample)'s wall  
Today 24.8.2013 16:20
- Product question (sample)**  
Case: Closed by First name Last name for Contact Jim Glynn (sample).  
On Product question (sample)'s wall  
Today 24.8.2013 16:20
- Product service time (sample)**  
Case: Closed by First name Last name for Account Fabrikam Inc. (sample).

Edit

0 followers

Open the CRM website to verify everything is working. Go to Settings - Data Management - Sample Data to populate the views, charts and feeds with test data.

