

Microsoft Dynamics CRM 2011 (CRM2011)

From a Technical point of view



Communicate with IT

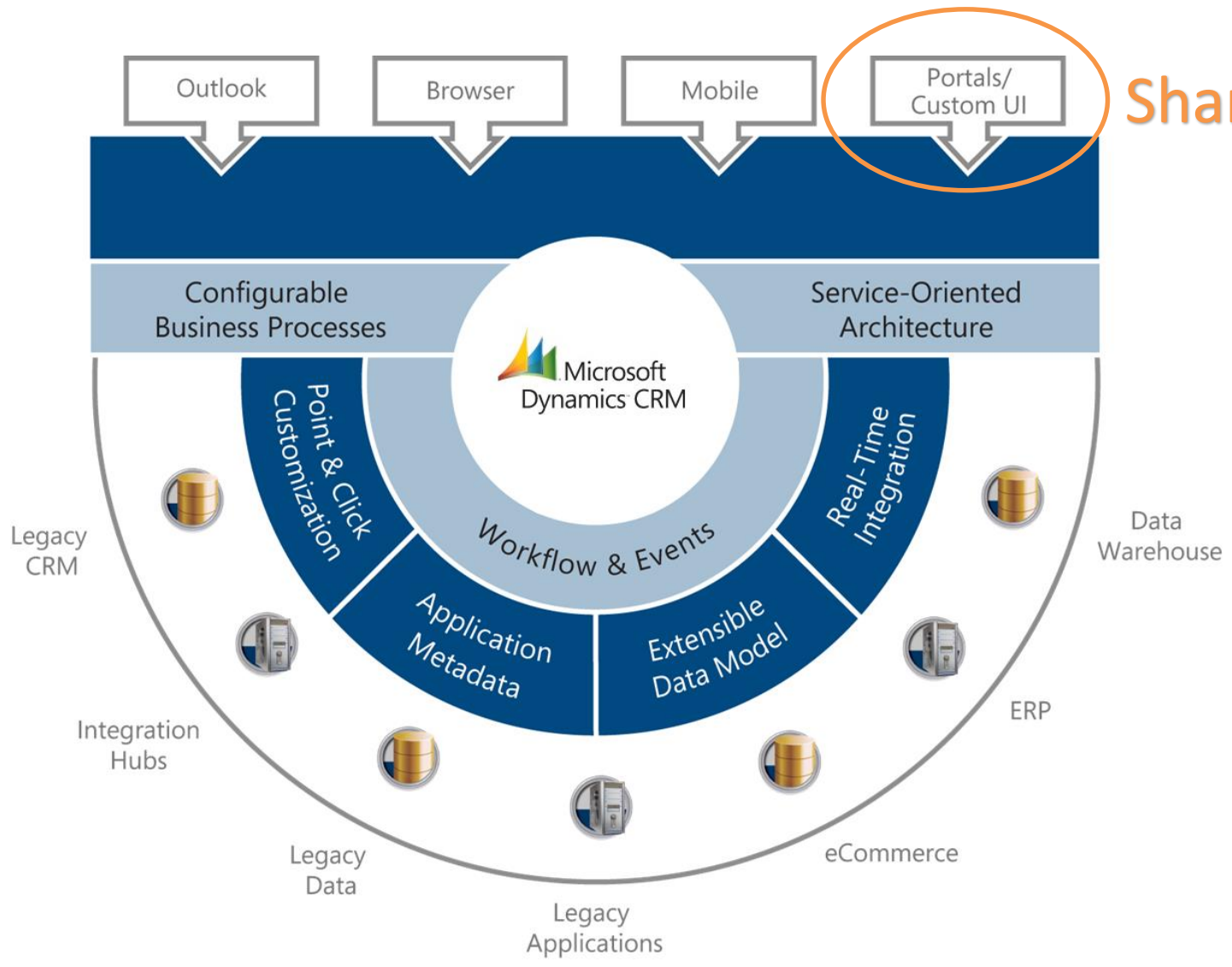
- Intro
 - Ramón Soto Mathiesen
- CRM2011
 - Architectural Overview
 - From a development point of view
 - SharePoint 2010 integration

- Delegate: 2013-
 - Stilling: CRM Architect
 - CRM Projekter: Forhåbentlig rigtig mange 😊
- Uddannelse: 2005-2010
 - cand.scient datalogi bifag i matematik (DIKU/Pisa/HCØ)
 - Er også MCP + MCSA + MCSE + MCDBA 😊
- Netcompany: 2010-2012
 - Stilling: Senior Software Architect
 - CRM Projekter : ISS, DSR, Peugeot, Konica Minolta, Mærsk Drilling, Ældre Sagen, Søfartsstyrelsen, Oticon A/S, Brüel & Kjær, ...
- Scan Jour: 2007-2010
 - Stilling: System developer
 - POLSAG (ESDH) – [C++, C#, JavaScript, Oracle, ...]
- Danish Dental Association: 2000-2007
 - Stilling: System Administrator & software developer
 - Arkivarius (ESDH) – [C#, JavaScript, MSSQL, ...]

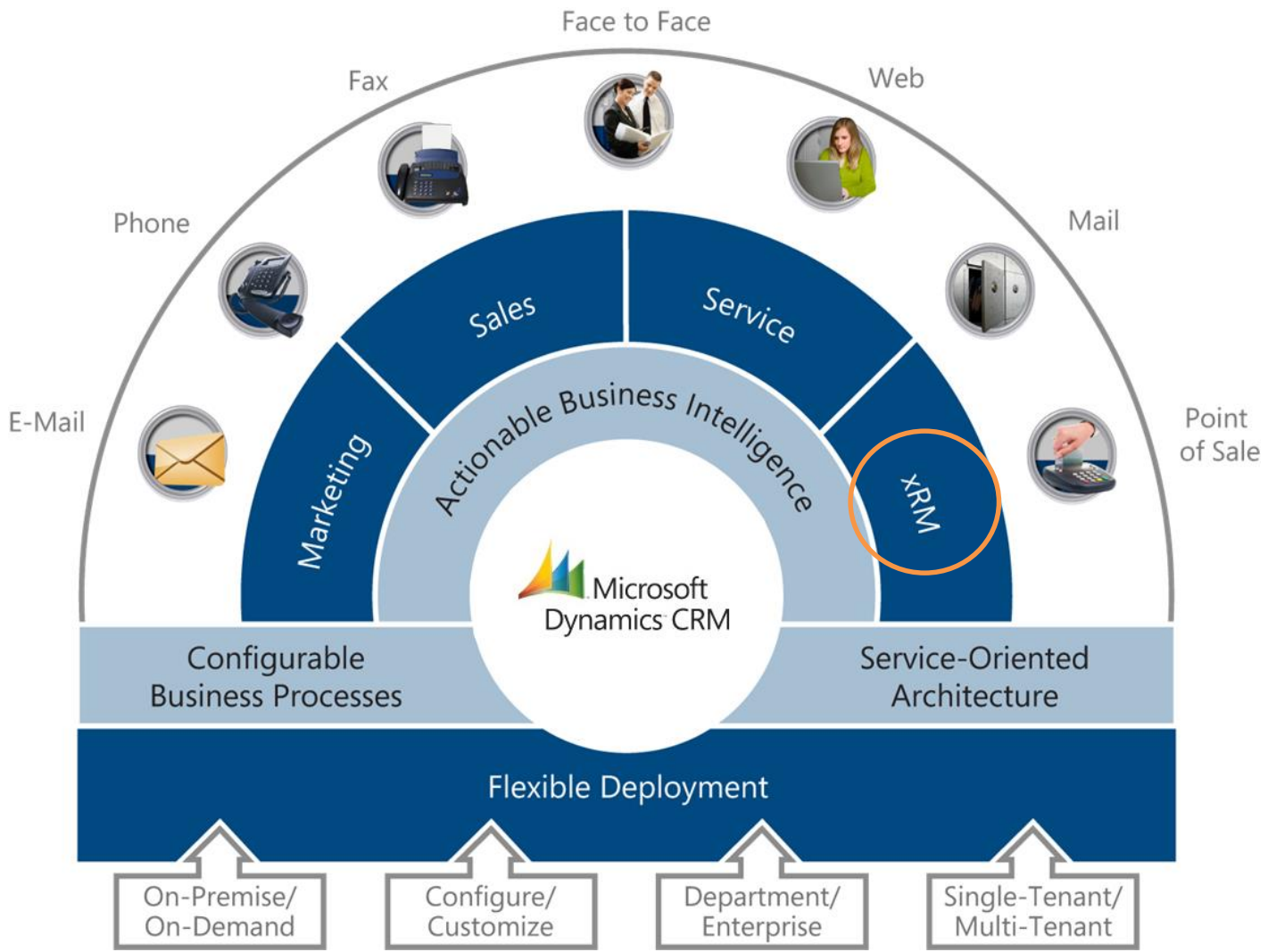




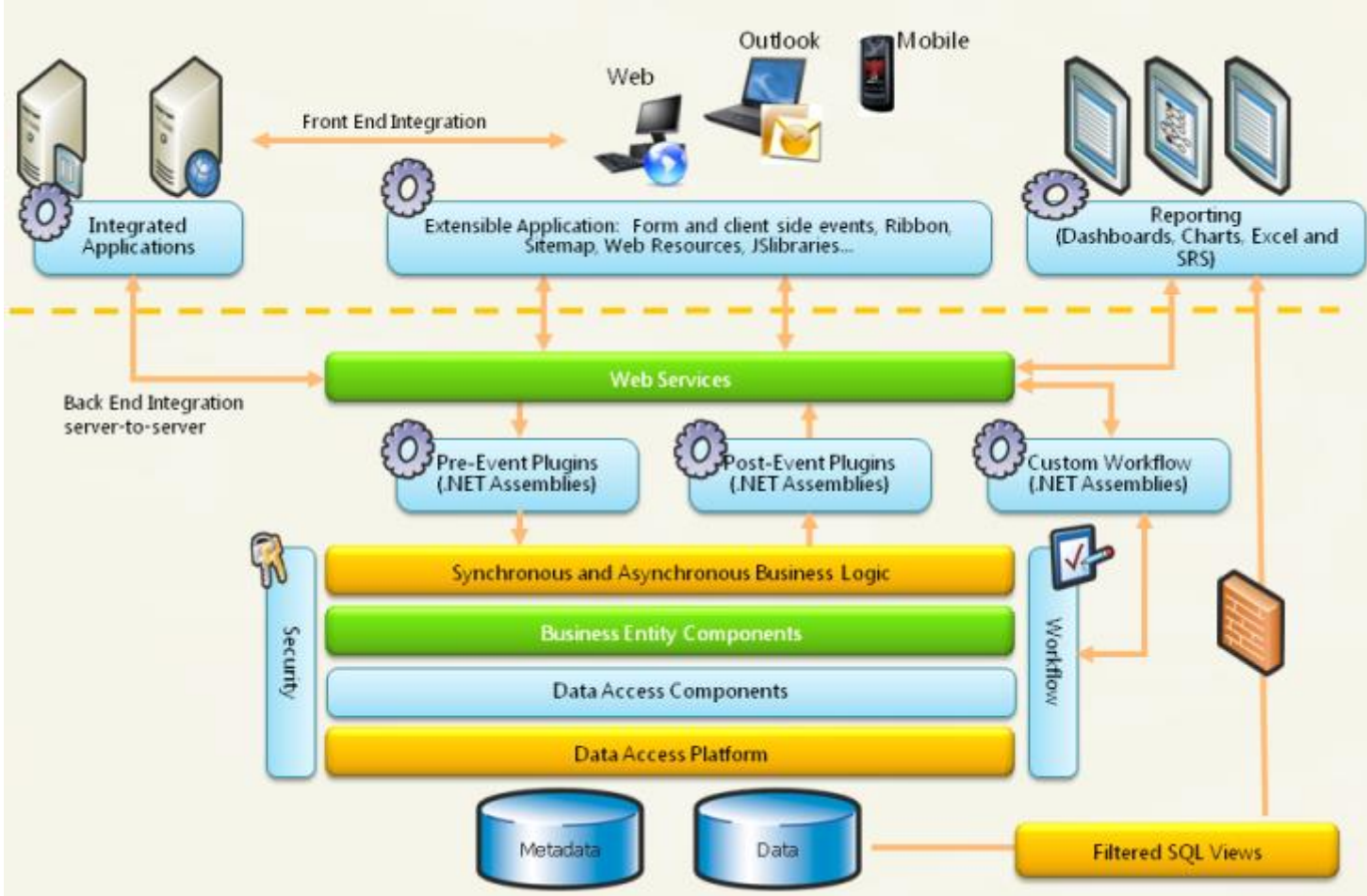
SharePoint



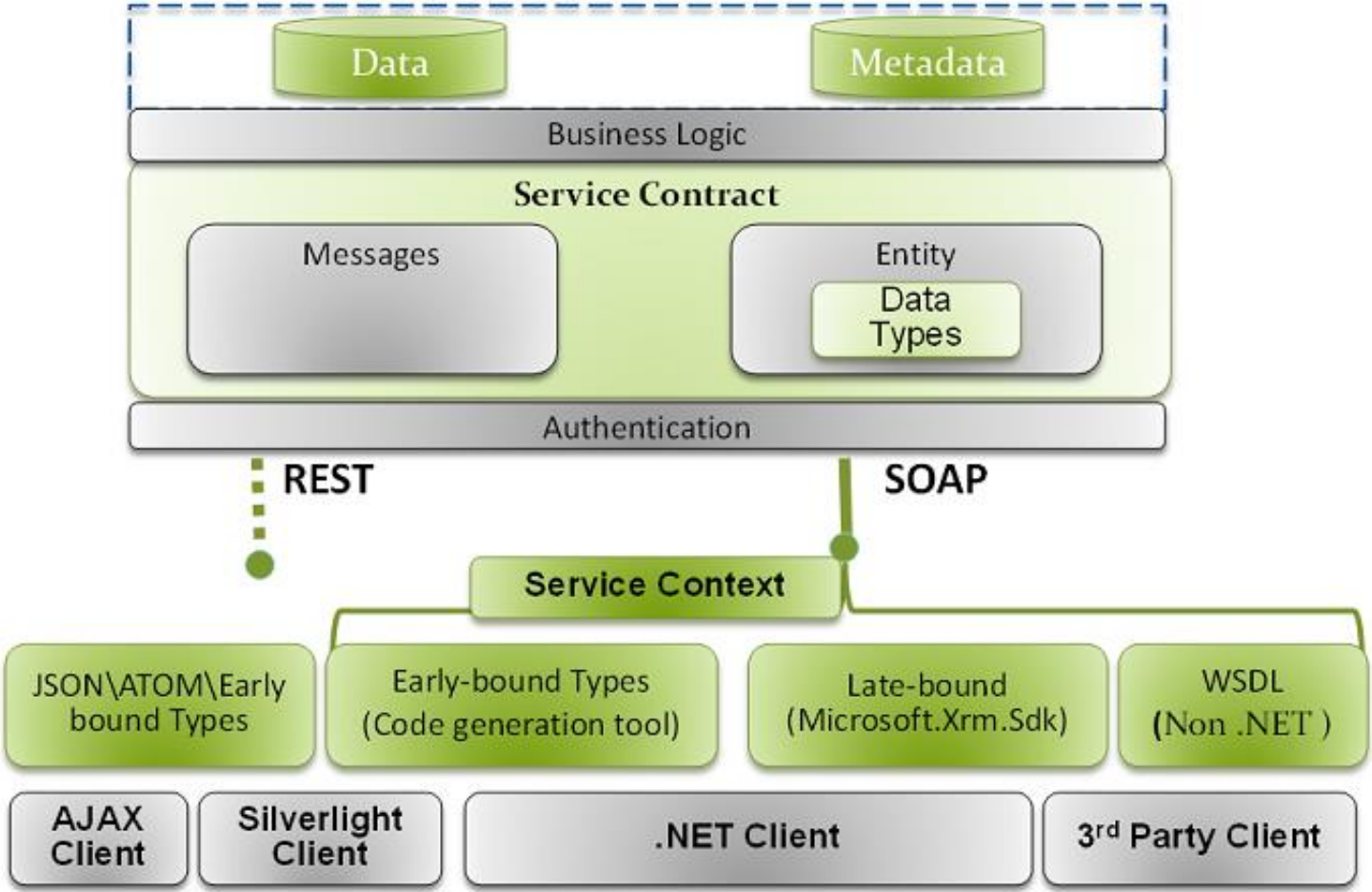
- Overordnede
 - .NET 4.0
 - Windows Workflow Foundation 3.0
 - SQL Server 2008 SP1 64bit or 32bit
 - Windows Server 2008 SP2 or R2 64bit
 - Cross-browser + Metro UI ... Snart med udgivelse af Polaris opdateringen ☺
- Hvorfor er platformen relevant og smart for Delegate?
 - Da den kommer med et færdigt produkt out-of-the-box (CRM) er det muligt at hurtigt opsætte en Demo/POC og efterfølgende arbejde videre på løsningen (xRM). Det passer jo meget fint med Delegates Agile (Scrum) kultur.
 - Der er indbygget standard integration til SharePoint og det er også muligt at bygge en helt ny UI som tilgår CRM forretnings logik (mere senere i slides)
 - Teknisk er platformen veldefineret og meget robust. Den kan nemt tilpasses til kundernes infrastruktur og behov (migrering, integrationer, on-premise/online, ...)
 - Det er sjældent et CRM projekt ikke også kick-starter andre projekter hos kunderne:
 - SharePoint dokument bibliotek eller Portal for ekstern tilgang
 - BI data warehouse for reportering

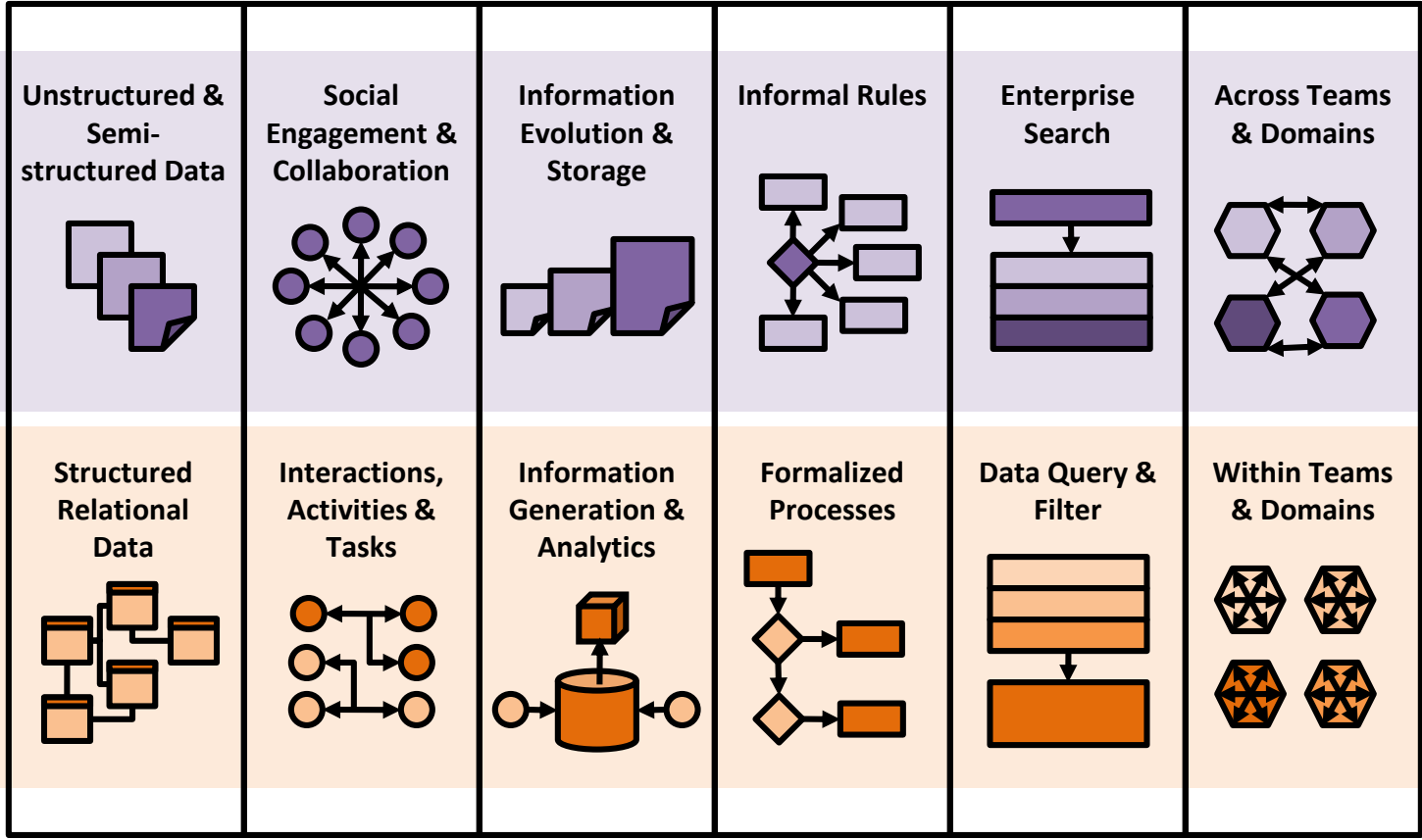


CRM2011 – From a development point of view (under-the-hood)



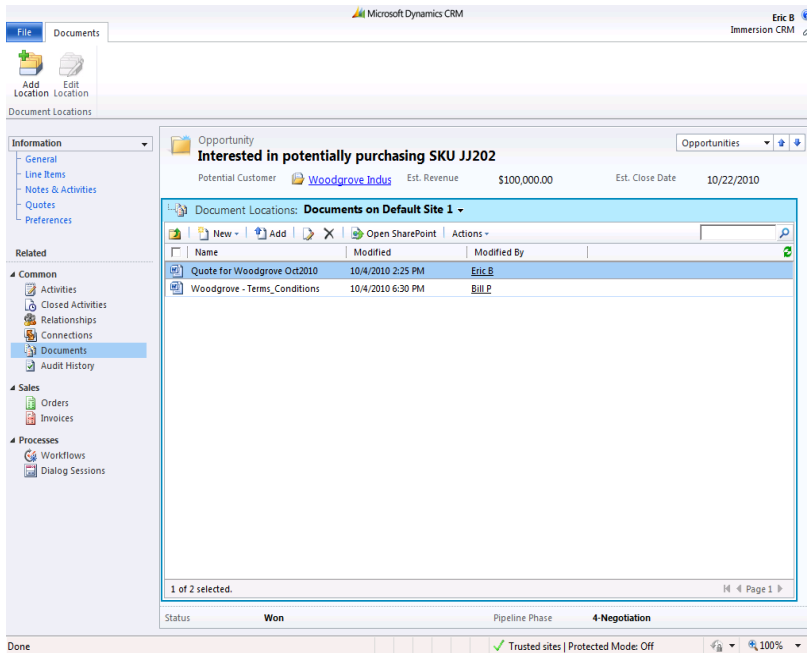
- **Out-of-the-box (OOB):**
 - Support for Configurations/Customizations to data model and UI
 - WSDL Based Endpoint that exposes the data model and all business logic
 - Integrated SQL security based on CRM roles (access from SQL or Excel)
- **Client-side:**
 - JavaScript support (only on entity Formulars but not entity Lists)
 - CSDL Based Endpoint: OData + REST API
 - No ASP.NET support as ISV folder is @deprecated
 - Use custom app/web services instead
- **Server-side:**
 - Plugins (.NET assemblies)
 - Pre- and Post- transaction events (Sync- and Asynchronous)
 - Visual Workflows (WWF 3.0) & Custom Workflows (.NET assemblies)
 - Only Post- transaction events (Asynchronous)
- Reports & Custom Reports by using SQL 2008 BIDS
- Custom applications (ex: online applications on Azure)
- Custom services (ex: for integrations)





Remark: CRM2011 .NET 4.0 vs SharePoint 2010 .NET 3.5

- Out-of-the-box (OOB):
 - SharePoint Document Management in CRM. Two Step Setup:
 - Install SharePoint WSP
 - Configure CRM Locations & Entities



Out of the Box Experience

Document Library
per CRM entity

Folder per CRM
record

Mainly: Visual
Application
Integration

No Metadata /
Attribute
Synchronization

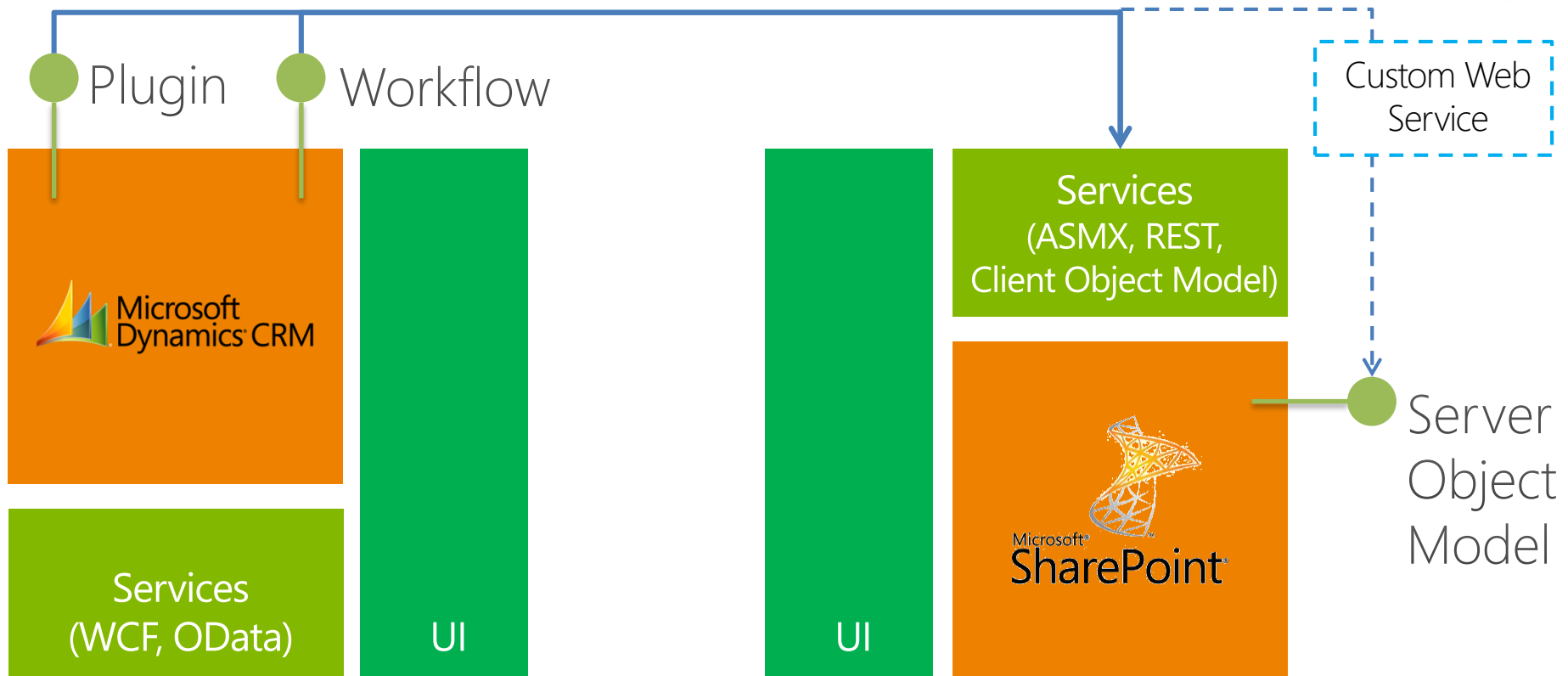
- Common Scenarios:
 - Control & Automate Provisioning
 - Decide what kind of storage is created, where and when
 - Expose CRM data to SharePoint
 - Publish CRM Data to a broader audience and make it Searchable CRM Data as Metadata on SharePoint items and within Office
 - Combine, Compose & Collaborate
 - Bridge structured and unstructured environments
 - Understanding the possibilities and limitations are key but ... the sky is the limit!!! 😊

Controlled
Provisioning

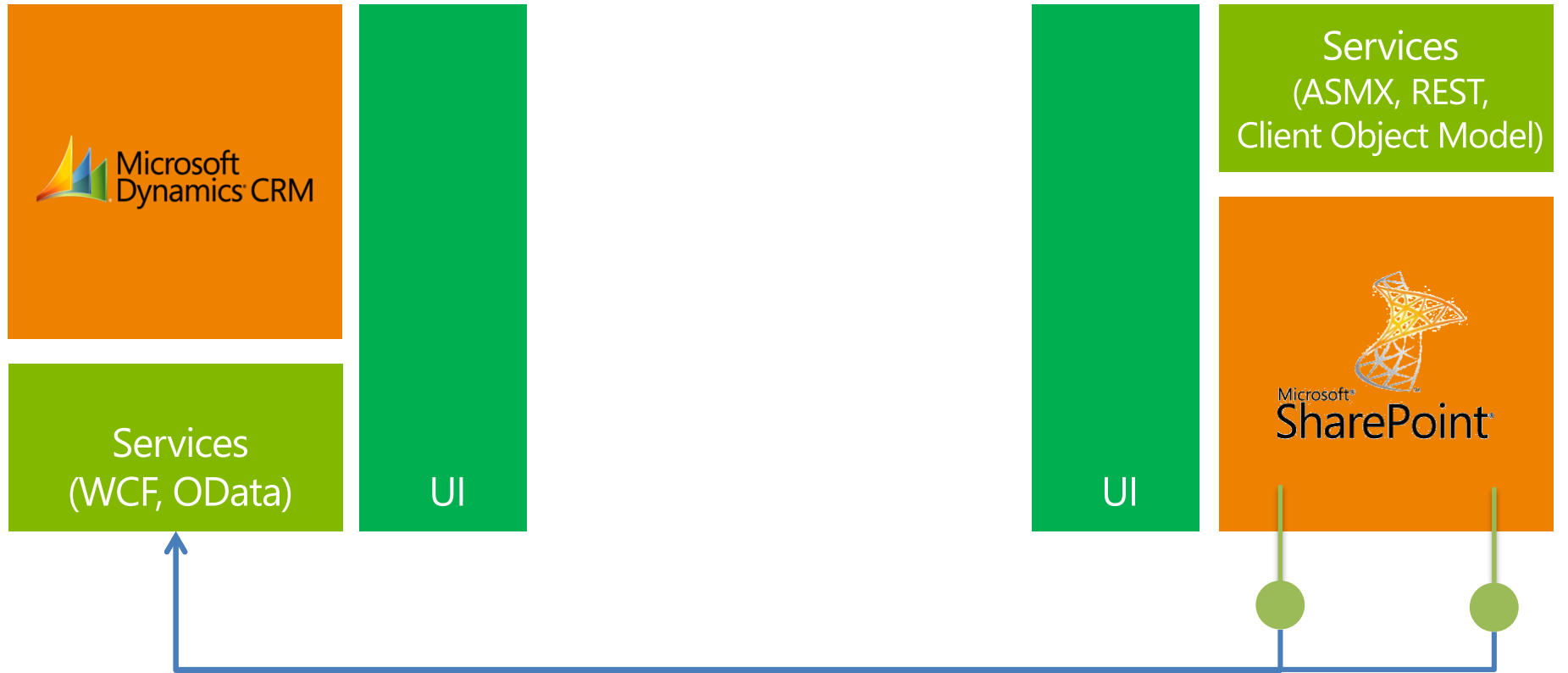
Broader Audience
& Search

Metadata

Combine the best
of 2 worlds



- From CRM2011 to SharePoint 2010:
 - Use SharePoint Client Object Model
 - Use SharePoint Web Services (ASMX)



- From SharePoint 2010 to CRM2011:
 - Use the CRM WSDL/CSDL Based Endpoint

Event Receiver Workflow

Spørgsmål?