



## Microsoft Dynamics CRM: Server Requirements

The following sections list the software and application requirements for Microsoft Dynamics CRM Server.

### Windows Server Operating System

Microsoft Dynamics CRM 4.0 can be installed only on Windows Server 2003 or Windows Server 2008 computers. The specific versions and editions of Windows Server that are supported for installing and running Microsoft Dynamics CRM Server are listed in the following sections.

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**Important**

Microsoft Windows 2000 Server editions are not supported for installing and running Microsoft Dynamics CRM 4.0.

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#### 1.1.1 Supported Windows Server 2003 Editions

The following editions of the Windows Server 2003 operating system are supported for installing and running Microsoft Dynamics CRM Server and components:

- Windows Server 2003, Web Edition SP2
- Windows Server 2003, Standard Edition SP2, or Windows Server 2003 R2, Standard Edition SP2
- Windows Server 2003, Enterprise Edition SP2, or Windows Server 2003 R2, Enterprise Edition SP2
- Windows Server 2003, Datacenter Edition SP2, or Windows Server 2003 R2, Datacenter Edition SP2
- Windows Server 2003, Small Business Edition R2, Standard
- Windows Server 2003, Small Business Edition R2, Premium
- Windows Server 2003 64x Standard Edition SP2, or Windows Server 2003 R2 64x Standard Edition SP2
- Windows Server 2003 64x Enterprise Edition SP2, or Windows Server 2003 R2 64x Enterprise Edition SP2
- Windows Server 2003 64x Datacenter Edition SP2, or Windows Server 2003 R2 64x Datacenter Edition SP2

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**Important**

Windows Server 2003 for Itanium-Based Systems is not supported for installing and running Microsoft Dynamics CRM 4.0.

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## 1.1.2 Supported Windows Server 2008 Editions

Windows Server 2008 is supported for installing and running Microsoft Dynamics CRM 4.0. However, before you install Microsoft Dynamics CRM, we recommend that you view the Microsoft Knowledge Base article [Support for Microsoft Dynamics CRM 4.0 on Windows Server 2008-based computers](http://go.microsoft.com/fwlink/?LinkId=114209) (<http://go.microsoft.com/fwlink/?LinkId=114209>), which includes a list of issues that may occur when you install or run Microsoft Dynamics CRM 4.0 on Windows Server 2008.

- Windows Server 2008 Standard (both 32-bit and x64 versions)
- Windows Server 2008 Enterprise (both 32-bit and x64 versions)
- Windows Server 2008 Datacenter (both 32-bit and x64 versions)
- Windows Web Server 2008 (both 32-bit and x64 versions)

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### Important

- Windows Server 2008 installed using the Server Core installation option is not supported for installing and running Microsoft Dynamics CRM 4.0.
  - Windows Server 2008 for Itanium-Based Systems is not supported for installing and running Microsoft Dynamics CRM 4.0.
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## Server Virtualization

Microsoft Dynamics CRM servers can be deployed in a virtualized environment using Microsoft Virtual Server 2005 R2 or Windows Server 2008 with Hyper-V. It is important to understand the limitations and best practices of server virtualization before you attempt to virtualize your installation of Microsoft Dynamics CRM.

For information about deploying Microsoft Dynamics CRM in an environment that is running Virtual Server 2005, see the Microsoft Knowledge Base article [Microsoft Dynamics CRM 4.0 on a computer that is running Microsoft Virtual Server 2005](http://go.microsoft.com/fwlink/?LinkId=132451). (<http://go.microsoft.com/fwlink/?LinkId=132451>)

For information about deploying Microsoft Dynamics CRM in an environment that is running Windows Server 2008 with Hyper-V, see the Microsoft Knowledge Base article [Support for Microsoft Dynamics CRM 4.0 on a computer that is running Windows Server 2008 Hyper-V](http://go.microsoft.com/fwlink/?LinkId=127728) (<http://go.microsoft.com/fwlink/?LinkId=127728>)

## Active Directory Modes

The computer on which Microsoft Dynamics CRM 4.0 is running must be a domain member in a domain that is running in one of the following Active Directory® modes:

- Windows 2000 Mixed
- Windows 2000 Native
- Windows Server 2003 Native
- Windows Server 2003 Interim
- All Windows Server 2008 Modes

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### Important

- The computer on which Microsoft Dynamics CRM is running cannot function as an Active Directory domain controller, unless it is running Microsoft Windows Small Business Server 2003 Premium Edition R2.
  - When you install Microsoft Dynamics CRM in a Windows 2000 Mixed-mode domain, you cannot add users to Microsoft Dynamics CRM that are located in a different domain.
  - Installing Microsoft Dynamics CRM Server in a domain that is running in Active Directory Application Mode (ADAM) is not supported.
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All Active Directory forest modes are supported. For more about Active Directory domain and forest modes, see [How to raise domain and forest functional levels in Windows Server 2003](http://go.microsoft.com/fwlink/?LinkId=52205) (<http://go.microsoft.com/fwlink/?LinkId=52205>).

## Internet Information Services

You must install and run either Internet Information Services (IIS) 6.0 or IIS 7.0 in IIS Compatibility Mode before you install Microsoft Dynamics CRM Server.

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**Note** When you install the Microsoft Dynamics CRM Server Web application on a computer that is running IIS, Microsoft Dynamics CRM Setup will turn on HTTP compression by default. If you use another method to compress HTTP communications, you may want to turn this feature off. To do this, start IIS Manager, right-click the **Web Sites** folder, click **Properties**, click the **Service** tab, and then clear **Compress application files** and **Compress static files**.

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## SQL Server Editions

Any one of the following Microsoft SQL Server® editions is required and must be installed, running, and available for Microsoft Dynamics CRM:

- Microsoft SQL Server 2005, Standard Edition with SP2
  - Microsoft SQL Server 2005, Enterprise Edition with SP2
  - Microsoft SQL Server 2005, Developer Edition with SP2
  - Microsoft SQL Server 2005, Workgroup Edition with SP2
  - Microsoft SQL Server 2005, Standard Edition, x64 with SP2
  - Microsoft SQL Server 2005, Enterprise Edition, x64 with SP2
  - Microsoft SQL Server 2005, Developer Edition, x64 with SP2
  - Microsoft SQL Server 2008, Standard Edition
  - Microsoft SQL Server 2008, Enterprise Edition
  - Microsoft SQL Server 2008, Standard Edition, x64
  - Microsoft SQL Server 2008, Enterprise Edition, x64
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### Important

- Computers running SQL Server 2008 may require one or more updates to be installed on the computer that is running SQL Server 2008 to work with Microsoft Dynamics CRM. If needed, these updates will be installed when

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you click **Update installation files** during Microsoft Dynamics CRM Server Setup and Microsoft Dynamics CRM Connector for SQL Server Reporting Services Setup. For more information about these updates see Microsoft Knowledgebase article “[Support for Microsoft Dynamics CRM 4.0 that is compatible with Microsoft SQL Server 2008.](http://go.microsoft.com/fwlink/?LinkID=125888)” (<http://go.microsoft.com/fwlink/?LinkID=125888>)

- Microsoft SQL Server 2008, Workgroup Web, Compact, or Express editions are not supported for running Microsoft Dynamics CRM.
- SQL Server 2000 editions are not supported with this version of Microsoft Dynamics CRM Server.
- 64-bit SQL Server versions for Itanium (IA-64) systems are not supported.
- Microsoft Dynamics CRM Server now supports a named instance of SQL Server when you add or create organization databases.
- You must install the cumulative update package 2 for SQL Server 2005 SP2 on the SQL Server when you use SQL Server 2005, Workgroup Edition.
- SQL Server 2005, Workgroup Edition is supported only if Microsoft Dynamics CRM is installed on Windows Small Business Server.
- SQL Server 2005, Workgroup Edition is not supported for running the Microsoft Dynamics CRM Connector for Microsoft SQL Server Reporting Services when Microsoft Dynamics CRM Server is installed as an Internet-facing deployment (IFD). This is because SQL Server 2005 Workgroup Edition does not support custom data extensions. Therefore, some features such as report scheduling will not work.

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## SQL Server Reporting Services

The following SQL Server Reporting Services editions are required and must be installed, running, and available for Microsoft Dynamics CRM Server:

- SQL Server 2005, Standard Edition SP2
- SQL Server 2005, Enterprise Edition SP2
- SQL Server 2005, Standard Edition, x64 SP2
- SQL Server 2005, Enterprise Edition, x64 SP2
- Microsoft SQL Server 2008, Standard Edition
- Microsoft SQL Server 2008, Enterprise Edition
- Microsoft SQL Server 2008, Standard Edition, x64
- Microsoft SQL Server 2008, Enterprise Edition, x64

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### Important

- SQL Server 2000 Reporting Services editions are not supported with this version of Microsoft Dynamics CRM Server.
- SQL Server 2005, Workgroup Edition is not supported for running the Microsoft Dynamics CRM Connector for Microsoft SQL Server Reporting Services when Microsoft Dynamics CRM Server is installed as an Internet-facing deployment (IFD). This is because SQL Server 2005

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Workgroup Edition does not support custom data extensions. Therefore, some features such as report scheduling will not work.

- Microsoft Dynamics CRM Connector for Microsoft SQL Server Reporting Services cannot be used to view a report that uses a Windows SharePoint Web Part or that is called from a custom .ASPX page. For these implementations, you must publish the report for external use. In addition, you must configure trust for delegation to enable double-hop Kerberos authentication. To publish a report for external use, follow these steps.
  1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
  2. Select the report, and on the Actions toolbar, click **Edit Report**.
  3. On the Actions menu, click **Publish Report For External Use**.

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## Software Component Prerequisites

The following SQL Server components are not installed during Setup and *must* be installed and running on the computer that is running SQL Server before you install Microsoft Dynamics CRM Server:

- SQL word breakers (only required for some Microsoft Dynamics CRM 4.0 language editions). For more information about word breaker versions for languages supported by SQL Server see [Word Breakers and Stemmers](http://go.microsoft.com/fwlink/?LinkID=127754) (<http://go.microsoft.com/fwlink/?LinkID=127754>).
- SQL Server Agent service
- SQL Server Full Text Indexing

The following components are *not* installed during Setup. These components must be installed and running on the computer where Microsoft Dynamics CRM Server will be installed:

- Services
  - Indexing Service – By default, this service is installed during Windows Server 2003 Setup. However, the service is not set to start automatically. To set this service to start automatically, click **Start**, click **Run**, type *services.msc*, and then click **OK**. In the **Services** list, right-click **Indexing Service**, and then click **Properties**. On the **General** tab in the **Startup type** list, select **Automatic**, and then under **Service status** click **Start**, and then click **OK**.
  - IIS Admin service.
  - World Wide Web Publishing service.
- Windows Data Access Components (MDAC) 2.81 (This is the default version of MDAC with Windows Server 2003.)
- Microsoft ASP.NET (Must be registered. Does not have to be running.)

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### Important

Before you run Setup, you must remove (uninstall) any pre-released versions of Microsoft .NET Framework 3.0. To do this, open **Add or Remove Programs**, click the prerelease version, click **Change/Remove**, and then follow the instructions that are on the screen.

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## Verify Prerequisites

Before you install Microsoft Dynamics CRM Server, review the server installations and note the following:

- Microsoft SQL Server can be, but is not required to be, installed on the same computer as Microsoft Dynamics CRM Server.
- If Microsoft Dynamics CRM Server and SQL Server are installed on different computers, both computers must be in the same Active Directory domain.
- SQL Server can be installed by using either Windows authentication or mixed-mode authentication. (Windows authentication is recommended for increased security and Microsoft Dynamics CRM will use only Windows authentication).
- The service account that SQL Server uses to log on to the network must be either a domain user account (recommended) or the local system account. Installation of Microsoft Dynamics CRM will fail if the SQL Server service account is the local administrator.
- The SQL Server service must be started and can be configured to automatically start when the computer is started.
- The SQL Server Reporting Services service must be started and configured to automatically start when the computer is started.
- SQL Server Agent must be started. This service can be configured to automatically start when the computer is started.
- The Microsoft Search service (Full-Text Service) must be running. This is required for Full-server role, Application-server role, or Help-server role installations.
- Although it is optional, we recommend that you accept the SQL Server default settings for Collation Designator, Sort Order, and SQL Collation. Microsoft Dynamics CRM supports both case-sensitive and case-insensitive sort orders.
- Microsoft Dynamics CRM Server Setup requires at least the Named Pipes network library to authenticate using SQL Server. By default, both Named Pipes and TCP/IP network libraries are enabled when you install SQL Server.

## Microsoft Dynamics CRM Connector for SQL Server Reporting Services

The Microsoft Dynamics CRM 4.0 Connector for Microsoft SQL Server Reporting Services is a service that connects the Microsoft Dynamics CRM computer to the SQL Server Reporting Services computer. The Microsoft Dynamics CRM Connector for Microsoft SQL Server Reporting Services eliminates the Kerberos double-hop authentication that was required for Microsoft Dynamics CRM 3.0 deployments when SQL Server Reporting Services was installed on a separate computer.

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### Important

Microsoft SQL Server 2005, Workgroup Edition is not supported for running the Microsoft Dynamics CRM Connector for SQL Server Reporting Services when Microsoft Dynamics CRM is used in an Internet-facing deployment (IFD). This is because SQL Server 2005 Workgroup Edition does not support custom data extensions. Therefore, some features such as report scheduling will not work.

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### 1.1.3 Microsoft Dynamics CRM Connector for SQL Server Reporting Services requirements

The Microsoft Dynamics CRM Connector for SQL Server Reporting Services has the following general requirements:

- You must complete Microsoft Dynamics CRM Server Setup *before* you run Microsoft Dynamics CRM Connector for SQL Server Reporting Services Setup.
- You can install and run only one instance of Microsoft Dynamics CRM Connector for SQL Server Reporting Services on a computer that has SQL Server 2005 Reporting Services or SQL Server 2008 Reporting Services installed.
- Separate deployments of Microsoft Dynamics CRM cannot share one SQL Server Reporting Services server. However, a single deployment of Microsoft Dynamics CRM that has multiple Organizations can use the same SQL Server Reporting Services server.

## Microsoft Dynamics CRM E-mail Router Software Requirements

The following sections list the software and application software requirements for Microsoft Dynamics CRM E-mail Router.

Microsoft Dynamics CRM E-mail Router Setup consists of two main components: the E-mail Router component and the Rule Deployment Manager component. The E-mail Router component installs the E-mail Router service and E-mail Router Configuration Manager. The E-mail Router Configuration Manager is used to configure the E-mail Router. The Rule Deployment Manager component deploys the rules that enables received e-mail messages to be tracked.

Any one of the following operating systems is required to install and run the E-mail Router or Rule Deployment Manager.

- Windows Server 2008
- Windows Server 2003 (all editions)
- Windows Vista®
- Windows XP Professional SP2
- Windows XP Tablet PC Edition SP2
- Windows XP Professional x64 Edition

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#### Important

- Windows XP Media Center Edition is not supported for installing and running Microsoft Dynamics CRM E-mail Router.
  - Running Microsoft Dynamics CRM E-mail Router (32-bit) is not supported on a Windows Server 64-bit operating system, in Windows- (32-bit) -On-Windows (64-bit) (WOW) mode.
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### 1.1.4 Exchange Server

Microsoft Exchange Server is only required if you want to use the E-mail Router to connect to an Exchange Server e-mail messaging system. To do this, the E-mail Router can be installed on any of the previously-mentioned Windows or Windows Server

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operating systems that have a connection to Exchange Server, which must be running one of the following editions:

- Exchange 2003 Standard Edition SP2
- Exchange 2003 Enterprise Edition SP2
- Exchange Server 2007 Standard Edition
- Exchange Server 2007 Enterprise Edition

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**Important**

Microsoft Exchange 2000 Server editions are not supported with these versions of Microsoft Dynamics CRM E-mail Router and Rule Deployment Manager.

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If missing, E-mail Router Setup installs the .NET Framework 3.0 on the computer where you install the E-mail Router.

The Rule Deployment Wizard component must be installed on a computer that is running any of the previously-mentioned Windows or Windows Server operating systems and has the Microsoft Exchange Server Messaging API (MAPI) client runtime libraries installed.

You can install the [MAPI client runtime libraries \(http://go.microsoft.com/fwlink/?LinkID=78805\)](http://go.microsoft.com/fwlink/?LinkID=78805) on the Microsoft Download Center

### 1.1.5 POP3/SMTP

In addition to Exchange Server, POP3 e-mail systems are supported for incoming e-mail message routing.

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**Important**

- When you use the **Forward Mailbox** option on the **User** form, the POP3 e-mail server must provide support where an e-mail message can be sent as an attachment to another e-mail message.
  - SMTP is the only transport protocol that is supported for outgoing e-mail message routing.
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If you install the Microsoft Dynamics CRM E-mail Router to connect to a POP3 and SMTP server, the following standards are required:

- POP3: RFC 1939

SMTP: RFC 2821 and 2822