

Migrate from Microsoft Dynamics CRM Online to Microsoft Dynamics CRM (on-premises)

Applies to: Microsoft Dynamics CRM Online 2015 Update 1

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Migrate Microsoft Dynamics CRM Online to Microsoft Dynamics CRM on-premises

This document describes the steps needed to migrate from an instance of Microsoft Dynamics CRM Online to a Microsoft Dynamics CRM 2015 on-premises deployment. To complete the migration, follow the steps provided here in the order presented.

Important

This document assumes that you already have a deployment of Microsoft Dynamics CRM Server 2015 on-premises. For information about how to deploy Microsoft Dynamics CRM Server 2015, see [Microsoft Dynamics CRM Server installation](#).

To migrate from Microsoft Dynamics CRM Online 2015 Update 1 to Microsoft Dynamics CRM (on-premises), you must have Microsoft Dynamics CRM 2015 or a later version.

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Feature and customization changes when you migrate from Microsoft Dynamics CRM Online 2015 Update 1 to Microsoft Dynamics CRM 2015 on-premises

Before you migrate from Microsoft Dynamics CRM Online 2015 Update 1 to Microsoft Dynamics CRM 2015 on-premises, be aware of the following behaviors or issues. These characteristics will appear after you import a Microsoft Dynamics CRM Online 2015 Update 1 organization into a Microsoft Dynamics CRM 2015 on-premises deployment.

Managed solutions

All managed solutions that have a dependency on a feature introduced in Microsoft Dynamics CRM Online 2015 Update 1 will be removed from the organization that is prepared for migration. For example, this applies if the solution includes one or more of the following features:

- A rollup field that uses the AVG operator or aggregates data across all activities related to a record.
- A calculated field that computes the difference between two dates by using DIFFINDAYS, DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, you can't export record creation or update rules from Microsoft Dynamics CRM Online 2015 Update 1 to Microsoft Dynamics CRM 2015 on-premises. More information: [Set up rules to automatically create or update records in CRM](#)

Unmanaged solutions

Any field in an unmanaged solution that includes a feature introduced in Microsoft Dynamics CRM Online 2015 Update 1 will be removed from the organization. For example, this applies if the field includes one of the following features:

- A rollup field that uses the AVG operator or aggregates data across all activities related to a record.
- A calculated field that computes the difference between two dates by using DIFFINDAYS, DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, these behaviors appear:

- You can't export record creation or update rules from Microsoft Dynamics CRM Online 2015 Update 1 to Microsoft Dynamics CRM 2015 on-premises. More information: [Set up rules to automatically create or update records in CRM](#)
- Records with date and time fields having values earlier than January 1, 1900 are considered invalid and will return an error message, such as "Invalid Date/Time The date/time format is not valid, or the value is outside the supported range." When this issue occurs you can't open forms, view lists, or process workflows from an entity record that has a date and time value that's before January 1, 1900.

Copy your CRM Online organization encryption key

During the import of the Microsoft Dynamics CRM Online database into your Microsoft Dynamics CRM (on-premises) deployment, you must provide the organization database encryption key used for your instance of Microsoft Dynamics CRM Online.

1. Sign in to the instance of Microsoft Dynamics CRM Online that you want to migrate as a user with the system administrator security role.
2. Go to Settings > Data Management.
3. Choose **Data Encryption**.
4. In the Data Encryption dialog box, select **Show Encryption Key**, in the **Current encryption key** box select the encryption key, and copy it to the clipboard.
5. Paste the encryption key in to a text editor, such as Notepad.

 **Warning**

By default, Microsoft Dynamics CRMM generates a passphrase that is a random collection of Unicode characters. Therefore, you must save the system-generated passphrase by using an application and file that supports Unicode characters. Some text editors, such as Notepad use ANSI coding by default. Before you save the passphrase using Notepad, select **Save As**, and then in the **Encoding** list, select **Unicode**.

6. As a best practice, save the file that contains the encryption key on a computer in a secure location on an encrypted hard drive.

Request a backup of your organization database

To request a backup of your Microsoft Dynamics CRM Online database contact Microsoft Customer Support Services for Microsoft Dynamics CRM Online. For contact information, see [Contact Technical Support](#).

Restore the Microsoft Dynamics CRM Online database

The backup of your Microsoft Dynamics CRM Online database must be restored by using a server running the same or a later version of Microsoft SQL Server as the database you receive. You will be able to request the version you need before you receive the database.

Restore the copy of the Microsoft Dynamics CRM Online database to a computer running SQL Server in the target Microsoft Dynamics CRM (on-premises) deployment. To do this, follow the steps here.

 **Restore a Microsoft Dynamics CRM Online organization database to SQL Server**

1. Open Microsoft SQL Server Management Studio, and then connect to the appropriate instance of SQL Server.
2. In Object Explorer, right-click **Databases**, and then click **Restore Database**.
3. Type the name of a new database in the **To database** open text box. The database name must include **_MSCRM** in the name. For example the database name is **Contoso_MSCRM**.
4. On the **General** page, in the **Source** section, click **Device**.
5. Click the browse button in the **Device** option. This opens the **Select backup devices** window.
6. In the **Select backup devices** window, click **Add** to open the **Locate Backup File** window.
7. Select the file you want to use for the restore operation, and then click **OK**.
8. Click **OK** to close the **Select backup device** window.
9. Mark the checkbox in the **Restore column next to the backup set** option.
10. Click **OK** to begin the restore process.

Apply the latest updates to the CRM on-premises deployment

You must apply the latest Microsoft Dynamics CRM (on-premises) updates before you import the CRM Online database. More information: [Microsoft Dynamics CRM 2015 Updates and Hotfixes](#)

Import the CRM Online database into the CRM on-premises deployment

How long it takes to complete the import of the organization database depends on several factors. These factors include the size of the database you are importing, the number of users, and the hardware you use to complete the import.



Note

The procedure described here uses Microsoft Dynamics CRM Deployment Manager. Deployment Manager is an MMC snap-in that is included with Microsoft Dynamics CRM Server. Alternatively, you can run Windows PowerShell commands to complete the import. More information: [Import-CrmOrganization](#)

To import an organization, you must have the Deployment Administrator Microsoft Dynamics CRM role.

► Import an organization database using Deployment Manager

1. On the Microsoft Windows Server running the Microsoft Dynamics CRM Server Deployment Tools server role, start **Deployment Manager** (DMSnapin.msc).
2. Start the Import Organization Wizard. Right-click **Organizations**, and then click **Import Organization**.



Note

You will receive a message if you attempt to import into a Microsoft Dynamics CRM (on-premises) version that allows only one organization per deployment. The message notifies you that proceeding will deactivate, but not delete, the existing organization.

3. Select the SQL Server and database. In the **Select SQL Server** window, select the Microsoft SQL Server where the organization database is restored in the **SQL Server** list, and then select the organization database in the **Organization database** list. Click **Next**.
4. Specify the organization name. Enter the display name and name for the organization in the **Specify the Organization Settings** window. The **Display name** will appear in Microsoft Dynamics CRM applications. The **Unique Database name** will be used as the database name in SQL Server and will also be used to construct the URL for client applications. Notice that the values you enter don't need to match the names that you used with Microsoft Dynamics CRM Online. Click **Next**.
5. Specify the Microsoft SQL Server Reporting Services server. In the **Specify Reporting Services Server** window, type the Reporting Services server URL for the organization in the **Report Server URL** field. Click **Next**.
6. Select the method for mapping users. Map users from the Microsoft Dynamics CRM Online deployment to the Microsoft Dynamics CRM (on-premises) deployment. Users must already exist in Active Directory for the Microsoft Dynamics CRM (on-premises) deployment. The Import Organization Wizard does not create the users automatically. To complete the mappings, the user running the import operation must be mapped to a user in Microsoft Dynamics CRM. For more information about how to map users, see [Import an organization](#).
7. In the System Checks window you receive the results of several environment diagnostic checks. If you receive a red alert, the issue must be resolved prior to completing the wizard. If you receive a yellow warning, you may proceed with the import. Click **Next**.

Due to versioning differences between Microsoft Dynamics CRM Online and Microsoft Dynamics CRM (on-premises), you may receive a warning. This warning is expected and in most cases shouldn't prevent the import from completing. After you successfully

complete the steps in this document, the versioning will be correct.

8. Begin the import. In the Ready to Import window, verify that the information is correct, and then click **Import**.
9. Complete the import. After the import is complete, the Import Organization window appears. Click **View** the log file to view the log file that is created during the import. If the import is successful, click **Finish**.

The import log is stored in the C:\Documents and Settings\\Application Data\Microsoft\MSCRM\Log folder.

10. Activate encryption
 - a. As a user with System Administrator security role privileges, sign-in to the organization that was just imported, then go to Settings > Data Management.
 - b. Choose **Data Encryption**.
 - c. In the **Activate Encryption Key** box enter the encryption key that you copied earlier, and then select **Activate**.
 - d. Select **OK** in the confirmation message and then choose **Close** to exit the Data Encryption page.
 - e. We recommend that you copy the key to a safe place.

See Also

Plan and deploy Microsoft Dynamics CRM Online

Add interoperation features to Microsoft Dynamics CRM Online