



CRM Tips 'n' Tricks from Altico

There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your May 2010 CRM tip:

Solving a Microsoft CRM Access Problem

Here's an interesting case. A long-time CRM user got a new PC and could not log into Dynamics CRM on it. The PC was correctly added to his domain, and he had a valid user account in Microsoft CRM 4.0. He could also log on from other PCs, just not from his new one. When he attempted to log in, he would get several prompts for credentials, then it would fail with an error of HTTP Error 401.1 - Unauthorized: Access is denied due to invalid credentials.

After investigating his Internet settings, it was determined that the CRM URL was in the Trusted Internet sites but not in the Trusted Intranet Sites. The solution was to go to the Start Menu—>Control Panel—>Credential Manager (in Windows 7). In Credential Manager there was an entry for his domain userid. After deleting that entry, he could successfully log in to CRM.

Turns out what happened was when he first went to CRM, he typed in the URL. Since the site wasn't in the Intranet zone, it prompted him for credentials. He mistyped his credentials, and clicked "Yes" when IE asked him if he would like to save the credentials. Then the next time that he tried to log in, Windows attempted to use the saved credentials.

The lesson learned is that for on premises deployments you should always add the CRM URL to Trusted Intranet Sites, and not have Windows store your credentials. The only scenario where you should allow Windows to store your credentials is if you access CRM via an Internet Facing Deployment (and are not auto-authenticated via Active Directory).

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I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

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