



**NOTE:** It is critical to set up the paid subscription for your **entire user group**, or as close to actual headcount as possible. **Without licenses for your users, you cannot set up your system properly** (re data mapping during import, assigning user roles) and get your team started.

Never underestimate the power of momentum when planning for your CRM launch. Start simple, share your enthusiasm with users, and grow as you go. Over 250 Zero2Ten customers, large and small, have been very successful by leveraging this approach. Commit to the platform, adopt a realistic plan, and get started where CRM will have most immediate impact!

## ESTABLISH YOUR ORGANIZATION'S PAID SUBSCRIPTION FROM YOUR CRM TRIAL

1. Login to your CRM Online trial via Outlook or at **crm.dynamics.com** using your trial credentials (email and password).

Once logged in, click on “Activate Now” banner **or** go to:

Settings → System → Administration → Subscription Management → View Offers (You will be logged out. This is normal.) → Login again to Verify Credentials → Follow the Wizard through the following steps

2. Input information for the main contact person and company mailing address.
3. Input billing address and credit card information. You will be automatically billed each month in arrears.

VAT CODE – You may skip this if in the US (It is applicable in foreign countries for tax purposes).

4. Enter your number of users (again, it is **critical to set up the paid subscription for your entire user group**. Without licenses for your users, you cannot set up your system properly).

Additional storage is included for free for your first year for a total of 6 GB per organization.

5. You'll receive a confirmation screen and email. Congrats! Your subscription setup is complete. Welcome to the Dynamics CRM user family!

The top screenshot shows the Microsoft Dynamics CRM 2011 home page. The navigation bar includes 'SOLUTIONS', 'INDUSTRIES', 'DEPLOYMENT', 'CUSTOMERS', 'PARTNERS', 'SUPPORT', 'COMMUNITY', and 'MARKETPLACE'. A prominent 'Free Trial' banner is visible, along with a 'CUSTOMER SIGN IN' button. The bottom screenshot shows the 'Subscription Management' section in the navigation pane, which is highlighted with a red box. The main content area displays various system features like Announcements, Security Roles, Users, Business Units, Teams, and System Notifications.