

(80542A) –Customization and Configuration in Microsoft Dynamics CRM 2013

OBJECTIVE

This course describes the techniques required to customize Microsoft Dynamics CRM to meet the specialized needs of businesses. The topics covered include security; creation and configuration of entities; design of forms views and charts; auditing and solutions. The course describes each topic and how each topic relates to the other topics to produce a full configured, effective solution.

COURSE TOPICS

Module 1: Introduction to Customizing Microsoft Dynamics CRM 2013

- Customization or Development? Microsoft Dynamics CRM Solutions Introduction to Entity Customization

Module 2: Building a Security Model in Microsoft Dynamics CRM 2013

- Introduction to Business Units Overview of Security Roles User Management Overview Team Management Overview Teams and Sharing Manage Security Roles for Users and Teams

Module 3: Customizing Entities

- Entity Customization Concepts Create a Custom Entity Additional Entity Properties Modifying the Configuration of an Entity

Module 4: Customizing Fields

- Field Data Types Field Display Formats Field Properties Customize Existing Fields Configure Option Sets Status and Status Reason Fields Delete Fields

Module 5: Managing Relationships

- Types of Entity Relationships Create Entity Relationships 1:N Relationship Behavior Field Mappings in 1:N Relationships Connections and Connection Roles

Module 6: Customizing Forms

- Form Customization Overview Create and Modify Forms Quick Create and Quick View Forms Manage Multiple Forms Mobile Clients

Module 7: Configuring Business Rules

- Configure Business Rules

Module 8: Customizing Views

- View Customization Concepts System Views Create Custom Views Remove Unwanted Views

Module 9: Customizing Charts and Dashboards

- Create and Modify Charts Export and Import Charts Create and Modify Dashboards

Module 10: Additional Security Options

- Field Security Access Team Templates Auditing Overview

Module 11: Business Process Flows

- Business Process Flows

At Course Completion

- Design and implement strategies for the creation of Business Units and Security Roles
- Configure Microsoft Dynamics CRM Users and Teams
- Describe the principles of customizing the system
- Create and configure fields for both custom and system entities
- Create and configure custom entities, including standard and activity entities
- Design, create and configure relationships between entities.
- Create and configure Views, Charts and Forms for both system and custom entities
- Implement Field Security and Access Team Templates in Microsoft Dynamics CRM
- Design, create and configure Solutions in Microsoft Dynamics CRM
- Design, create and configure Business Rules and Business Process Flows to guide users through their work

PREREQUISITES

A working knowledge of how to use Microsoft Dynamics CRM 2011. It is recommended, but not required, that individuals have completed Microsoft Dynamics CRM 2011 or 2013 applications training. Because this training material focuses on customizing database entities, attributes, relationships, and mappings, it is recommended that individuals have a basic understanding of Microsoft SQL Server and relational database functionality.

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

24 Hours (in 3 days)

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course