

# Microsoft Dynamics CRM 365

## PART I – Applications in CRM

- **Introduction to Microsoft Dynamics CRM**
- **Functional CRM**
- **Admin CRM**
  - CRM installation – on premise, online
  - CRM DB structure
  - CRM Admin panel
  - CRM Licensing and deployment model
  - User Mgmt
  
- **Extending CRM technical**

## Sales

### Products

- Product Catalog
- Understanding the Product Catalog
- Unit Groups
- Adding Products
- Creating Price Lists
- Creating Discount Lists

### Sales Process

- Leads
- Opportunities
- Competitors
- Products
- Quotes
- Orders
- Invoices
- Goals Management

## Marketing

- Marketing Lists
- Campaigns
- Sales Literature
- Quick Campaigns

## Service

- Services
- Service Calendar
- Cases
- Knowledge Base
- Contracts

## **PART II – Administration, Settings & Configuration**

### II

#### **Administration & Security**

- Creating and managing Business Units, Users and Teams
- Privileges, Access Levels and Security Roles
- Creating and managing Security Roles
- System Settings

#### **Settings**

- Automatic Record Creation and Update Rules
- Auto Numbering
- Templates - Mail merge, Article, Email, Template, Contract
- Service Management - Case Settings with Record Creation and Update Rules, Service Terms, Service Scheduling

#### **System Settings & Configuration**

- Business Management
- Sites, Sales Territories, Facilities and Resource Groups
- Working with Multi Currency
- System Queues and Custom Queues
- Services and Business Closures
- Fiscal Year Settings and Quotes
- Subjects
- Connections
- Knowledge Base Management

#### **Data Management**

- System Jobs
- Duplication Detection Settings, Rules and Jobs

- Bulk Record Deletion
- Data Maps and Imports

#### **Process Center**

- Processes (Workflows, dialogues, Actions, Plugins)

## **PART III – Basic and Advanced Customizations in MS Dynamics CRM**

#### **Entity Customization**

- Basic Form Customizations
- Basic UI Customization Capabilities
- Form Customization – Working with Tabs, Sections, Fields and IFrames
- Calculated and Roll Up fields.
- Quick Create and Quick View Forms.
- Interactive Forms
- Introduction to Application Event Programming
- Using Form and Field Events.

#### **MS CRM Entity Model**

- Customization Concepts – Entity Types and Attributes
- Creating Custom Entities and Attributes

#### **Relationships, Views and Advanced Views**

- Types of Relationships
- Relationship Behaviors
- Creating Entity Relationships
- Entity Mapping

#### **Views and Advanced Views**

- Public, Personal and System Views
- View Customizations – Common Tasks
- Advanced Views Customizations

#### **Form Scripting**

- Client side scripting using Java Script
- Working with I Frames
- Business Rules.

### **❖ Working with Web Resources**

#### **Advanced Client Side Scripting**

- Working with Web services
- ❖ **Report Wizard, Scheduling and Exporting Reports**
- ❖ **Working with Dash Boards**

## **PART IV – Extending MS Dynamics CRM**

### **Processes (Workflows & Dialogs)**

- Overview of Workflow
- Creating Workflows steps through Workflow Designer
- Overview of Dialogs
- Creating Dialog Pages, Prompt and Response
- Working with Input Parameters in Dialogs
- Creating and working with Actions
- Creating and Working with Business process flows.
- Creating and working with Actions

### **Ribbon Customizations**

- Creating & Hiding Ribbon Elements
- Enabling & Disabling Ribbon Elements

### **Introduction to Solutions**

- Managed & Unmanaged Solutions
- Importing & Exporting Solutions

### **Plugins**

- The Event Execution Pipeline
- IPluginExecutionContext Interface
- Developing Plugins
- Deploying Plugins
- Debugging Plugins

### **Custom Workflows**

- Developing Custom Workflow Activities
- Deploying Custom Workflow Activities
- Debugging Custom Workflow Activities