80729 Customization and Configuration for Dynamics CRM 2016

This course explains everything you need to know about customizing and configuring the Dynamics CRM 2016 system in accordance with a company's specific requirements.

Length Days: 3 | Length Hours: 24

Target Audience

Learners receive comprehensive Microsoft Dynamics exam preparation, becoming familiarized with the Dynamics CRM customization and configuration tools. Aspirants also learn to leverage the platform tools to create custom objects, automate tasks, modify user interface, and perform other such customizations.

Course Objectives

- Configure the Dynamics CRM settings
- Configure different entities and fields
- Implement entity relationships, custom actions, workflows, and dialogs
- Identify scenarios for utilizing multiple forms, and design considerations for charts
- Set default share views and public views, and configure and manage dashboards
- Identify role-based business processes
- Identify and manage business requirements and teams

Course Outline

1 - Introduction to Customization and Configuring Dynamics CRM

- Talent and Course Introduction
- Module Overview
- CRM Overview
- What is Dynamics Customization and Configuration?
- CRM Architecture
- Customization Methodology
- Module review
- Obtaining a Dynamics CRM Trial
- TEST YOUR KNOWLEDGE MODULE 1

2 - Manage Microsoft Dynamics CRM Online Subscriptions

- Module Overview
- Configuring CRM
- Overview of CRM Security
- User Administration
- Mailboxes
- Teams
- Module Review
- MODULE 2 PRACTICE
- Module 2: Configuring Dynamics CRM
- Practice 2.1: Configure Business Units, Users, and Teams
- TEST YOUR KNOWLEDGE MODULE 2

3 - CRM Security Model

- Module Overview
- Purpose of the CCRM Security Model
- Privileges
- Access Levels
- Security Roles
- Hierarchy Security
- Hierarchy Types
- Module review
- MODULE 3 PRACTICES
- Practice 3.1: Configure Dynamics CRM Security
- TEST YOUR KNOWLEDGE MODULE 3

4 - Introduction to Solutions

- Module Overview
- Solutions Overview
- Solution Detail
- Creating and Working with Solutions
- Working with Solution Assets
- Exporting Solutions
- Importing Solutions
- Module review
- TEST YOUR KNOWLEDGE MODULE 4
- MODULE 4: YOUR NOTES
- TEST YOUR KNOWLEDGE ANSWERS
- Module 4

5 - Entity and Field Customization

- Module Overview
- Types Entities
- Entity Ownership
- Entity Properties
- System vs Custom Entities
- Custom Entities and Security Roles
- Overview of Fields
- Field Properties
- Module review
- TEST YOUR KNOWLEDGE MODULE 5
- TEST YOUR KNOWLEDGE ANSWERS
- Module 5

6 - Additional Field Customization

- Module Overview
- Creating Fields to Meet Client Needs
- Calculated Fields
- Rollup Fields
- CRM Option Sets
- Alternate Keys
- Field Level Security
- State and Status Reason Transitions
- Module Review
- MODULE PRACTICE
- TEST YOUR KNOWLEDGE MODULE 6
- TEST YOUR KNOWLEDGE ANSWERS
- Module 6

7 - Configure mobile devices

- Module Overview
- Types of Relationships
- How and where they are created
- Many to Many Relationships
- Hierarchical Data
- Entity Mapping
- Connection and Connection Roles
- Module Review
- MODULE 7 PRACTICE
- Configure entities for mobile apps
- Scenario
- Connect to the CRM Online instance
- Navigate to the default solution
- Hide the fax field in CRM for Phones
- Add the city field to CRM for Phones Express
- Make the account entity read-only
- Publish changes
- Test the change to CRM for Phones Express
- Test the changes to CRM for Phones and CRM for Tablets
- TEST YOUR KNOWLEDGE MODULE 7
- TEST YOUR KNOWLEDGE ANSWERS
- Module 7

8 - Customizing Forms

- Module Overview
- Form types
- Qualities of a good form
- Building a Form
- Specialized Form Components
- Access Teams and Sub Grids
- Working with Navigation
- Additional Form Types
- Multiple Forms
- Form customizations and Mobile Clients
- Module Review
- MODULE 8 PRACTICE
- Set default synchronization method
- Scenario

- Connect to the CRM Online instance
- Navigate to the Email tab on System Settings
- Change the default synchronization methods
- Apply the defaults to existing mailboxes
- Review approval settings
- Scenario
- Connect to the CRM Online instance
- Navigate to the default solution
- Review the approval settings
- TEST YOUR KNOWLEDGE MODULE 8
- TEST YOUR KNOWLEDGE ANSWERS
- Module 8

9 - Business Rules

- Module Overview
- Business Rules
- Business Rule Scope
- Trigger Rules
- Condition and Actions
- Else Conditions and Actions Occur When Conditions Are True
- Module review
- MODULE 9 PRACTICE
- Configure forward mailbox record
- Scenario
- Connect to the CRM Online instance
- Navigate to mailboxes
- Create the forward mailbox record
- Review alerts
- Scenario
- Connect to the CRM Online instance
- Navigate to a mailbox record and review alerts
- Reject the email address
- Approve the email address
- Review alerts in the Sales area
- TEST YOUR KNOWLEDGE MODULE 9
- TEST YOUR KNOWLEDGE ANSWERS
- Module 9

10 - Views and Visualizations

- Module Overview
- Using Views
- View Customization
- System View Types Quick Find
- Customization Charts
- Customizing Dashboard
- Themes
- Module Review

11 - Introduction to Processes

- Module Overview
- Processes and Automation
- Workflow Basics
- Module review

12 - Business Process Flows

- What are CRM Business Process Flows
- Enabling Business Process Flows
- Steps Stages and Categories
- Conditional Branching
- Module Review

13 - Bringing it all Together

- Module Overview
- Review of Customization Topics Covered
- Senario
- Packaging in a Solution
- Module review
- Course Review