
Microsoft Dynamics CRM/365 Customization and Configuration

Varighed: 4 Days Kursus Kode: CRM-365-CC

Beskrivelse:

This course provides students with the tools to customize and configure a Dynamics CRM/365 implementation. The focus is on using and understanding how the platform tools that are provided can be leveraged to create custom objects, modify the user interface, automate tasks, and other specific customizations.

Målgruppe:

Consultant, Technical project manager, Application manager, Architect, Developer

Agenda:

- **The goals for this course:**
 - How to successfully configure specific application features such as auto-numbering, data management, and CRM's collaboration features.
 - Provide guidance on the designing a CRM security model including configuration of Business Units, Security Roles, Users, and Teams.
 - Using CRM's security model to control access to data, features, and functions.
 - How to create, package, manage, and deploy specific Dynamics CRM/365 customization through solutions.
 - Creating and maintaining custom entities, and custom fields based on specific needs.
 - Working with specialized fields such as calculated and rolup fields.
 - How to use CRM's different relationship types to configure how related records work together.
 - Creating and editing customized forms, as well as how to configure specialized components on them such as sub-grids, and quick views.
 - How to apply Portable Business Logic control how users interact with specific data on forms and entities.
 - Exploring the different tools available for creating specific views, charts, and dashboards based on specific needs.
 - Provide an overview of the different processes that are available in Dynamics CRM/365 and when each process type should be used.
 - How to create Business Process Flows that assist in capturing specific data based on a specific business process weather, it includes one or Multiple CRM entities.
 - How to bring all the individual topics covered together and apply them into one completed solution.
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Forudsætninger:

- A working knowledge of how to use Microsoft Dynamics CRM 2011/2013/2015.
 - It is recommended, but not required, that individuals have completed Microsoft Dynamics CRM/365 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.
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Indhold:

Business Process Flows

Flere Informationer:

For yderligere informationer eller booking af kursus, kontakt os på tlf.nr.: 44 88 18 00

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