CRM 2015 Customisation and Configuration

Duration: 3 Days   Course Code: T4CRM004

Overview:

This course describes the techniques required to customise 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.

Target Audience:

This training is intended for both novice and experienced customizers of Microsoft Dynamics CRM who are familiar with the end-user principles of the software. No programming skills are required, but a basic understanding of database principles will be an advantage.

Objectives:

- Design and implement strategies for the creation of Business Units and Security Roles

- Configure Microsoft Dynamics CRM Users and Teams

- Describe the principles of customising 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. It is recommended, but not required, that individuals have completed Microsoft Dynamics CRM 2013 or 2015 applications training. Because this training material focuses on customising database entities, attributes, relationships, and mappings, it is recommended that individuals have a basic understanding of Microsoft SQL Server and relational database functionality.

Content:

Module 1: Introduction to Customising Microsoft Dynamics CRM 2015

- Customisation or Development? Introduction or Entity Customisation.
- Lab: Create a Solution and publisher

Module 2: Building a Security Model in Microsoft Dynamics CRM 2015

- Introduction to Business Units.
- Overview of Security Roles.
- User Management Overview.
- Team Management Overview,
- Teamsand Sharing.
- Manage Security Roles for Users and Teams.
- Lab: Configure Security Roles
- Lab: Configure User Access

Module 3: Customizing Entities

- Entity Customization Concepts. Create a Custom Entity. Additional Entity Properties. Modifying the Configuration of an Entity.
- Lab : Create Custom Entities
- Lab : Create a Custom Activity Entity

Module 4: Customizing Fields

- Field Data Types. Field Display Formats. Field Properties. Customise Existing Fields. Configure Option Sets. Status and Status
- Reason Fields. Delete Fields.
- Lab: Create and Modify a Global Option Set

Module 5: Managing Relationships

- Types of Entity Relationships
- Create Entity Relationships1:N Relationship Behavior
- Field Mappings in 1:N Relationships
- Connections and Connection Roles.
- Lab : Create New Relationships
- Lab : Customize Relationship Mappings

Module 6: Customising Forms

- Form Customisation Overview.
- Create and Modify Forms.
- Quick Create and Quick View Forms.
- Manage Multiple Forms.
- Mobile Clients.
- Lab : Modify Form Layout and Add Fields
- Lab : Create a Role-Based Form for the Competitor entity.

Module 7: Configuring Business Rules

- Configure Business Rules
- Lab : Create a Business Rule

Module 8: Customising Views

- View Customisation Concepts.
- System Views.
- Create Custom Views.
- Remove Unwanted Views.
- Lab : Modify a Quick Find View
- Lab : Create Custom Views

Module 9: Customising Charts and Dashboards

- Create and Modify Charts.
- Export and Import Charts.
- Create and Modify Dashboards.
- Lab : Create a Custom Chart
- Lab : Create a Dashboard

Module 10: Additional Security Options

- Field Security.
- Access Team Templates.
- Auditing Overview
- Lab : Configure Field Security
- Lab : Create and Configure an Access Team Template

Module 11: Business Process Flows

- Business Process Flows
- Lab : Create a Multi-Entity Business Process Flow

Further Information:

For More information, or to book your course, please call us on 353-1-814 8200

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