



Microsoft Dynamics CRM 2013 Installation and Deployment

Duration: 2 Days Course Code: M80539

Overview:

This two-day training course provides individuals with the skills to install and deploy Microsoft Dynamics CRM 2013. The training material focuses on the components used within a Microsoft Dynamics CRM deployment, the hardware and software requirements needed to successfully deploy Microsoft Dynamics CRM, and the installation instructions for the primary Microsoft Dynamics CRM components: the Microsoft Dynamics CRM Server, the E-Mail Router, and Microsoft Dynamics CRM for Office Outlook. The course also covers upgrading from earlier versions, configuring an Internet-facing Deployment and administration tasks.

Target Audience:

This course is intended for implementation consultants, system integrators, or support professionals who need to install and deploy Microsoft Dynamics CRM 2013.

Objectives:

After completing this course, students will be able to:

Describe the components that are required for a successful Microsoft Dynamics CRM implementation.

Describe the deployment methods for installing Microsoft Dynamics CRM for Outlook.

CRM for Outlook.

Configure Claims-based authentication and Internet-facing deployment.

Install Microsoft Dynamics CRM Server.

Upgrade to Microsoft Dynamics CRM 2013.

Install Microsoft Dynamics CRM Reporting Extensions.

Manage Microsoft Dynamics CRM organizations using the

Deployment Manager.

Install and configure the Microsoft Dynamics CRM E-mail Router.

 Describe the high availability options for Microsoft Dynamics CRM 2013.

Prerequisites:

Before attending this course, students must have a working knowledge of:

- Microsoft Windows Server
- Active Directory
- Internet Information Services (IIS)
- Microsoft Exchange
- Microsoft SQL Server
- Microsoft Outlook

Content:

Module 1: System Requirement and Required Technologies

This module provides a high-level overview of the supporting technologies and describes the components of a Microsoft Dynamics CRM implementation.

Lessons

- Microsoft Dynamics CRM Offerings
- Email Processing
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft

Lab : Duplicate the Adventure Works Cycles Organization

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
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- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the

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- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL ServerUpgrade the Microsoft Dynamics CRM
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook

2011 Email Router

Upgrade Microsoft Dynamics CRM 2011

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- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics
 CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding

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- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
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- Install Active Directory Federation Services
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- Configure Claims-Based Authentication
- Configure an IFD
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- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
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- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
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- High-Availability Options for Other Supporting Components
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics
- CRM organizations.Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure

- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies

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- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
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- Update Microsoft Dynamics CRM
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- Other SQL Server High-Availability
- High-Availability Options for Other Supporting Components

Module 7: Microsoft Dynamics CRM for Microsoft Office Outlook

This module describes the installation requirements for the Microsoft Dynamics CRM for Outlook client and how to install and configure the client.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers

- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM

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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting

- Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics

- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
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- Requirements for Microsoft Dynamics
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- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
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- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft

- **Extensions**
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
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- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
 Plan the Upgrade of Microsoft Dynamics
- CRM 2011 for OutlookUpgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table

- CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
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- Configure an IFD
- Describe the requirements for configuring an IFD
- Review the certificates required for an IFD.
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- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
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- Discover how mailboxes are monitored.
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- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test
 Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
 Plan the Upgrade of Microsoft Dynamics
- CRM 2011 for Outlook
 Upgrade Microsoft Dynamics CRM 2011
 for Outlook
- Describe the base and extension table merge process

- Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IED
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview

- to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics

- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email
- Deploy Inbox Rules
- Install the Email Router on Multiple
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook

- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization

- CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.

- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.

- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring

- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.

- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.

- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook
 Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.

- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Module 5: Upgrade to Microsoft Dynamics CRM 2013

This module examines the planning considerations and the steps for upgrading an existing Microsoft Dynamics CRM deployment to Microsoft Dynamics CRM 2013.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft

- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
 Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft

- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting

- Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations

- Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
 Install the Microsoft Dynamics CRM Email
- Router.

 Review the Email Router configuration
- options.

 Create a forward mailbox.
- Review the purpose of deploying forwarding rules.

- Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install

- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring

- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace

- Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft

- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft

- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability
- High-Availability Options for Other Supporting Components

Lab : Install Microsoft Dynamics CRM for Outlook

- Configure Windows Firewall to allow incoming connections on port 5555.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website

- Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
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- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email

- Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Review ways to troubleshoot and diagnose problems and monitor performance.
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- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.Describe how to add an existing
- organization database to the deployment.
 Review Microsoft Dynamics CRM Server management tasks.

- Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.

- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.

- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration

- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server

- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router

- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.

- Setup
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test

- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
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- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
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- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization

- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Lab : Offline Capability

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.

- **Environment**
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Fmail Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
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- Mailbox Monitoring
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- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.

- settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster

- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRMMicrosoft Dynamics CRM for Office
- Outlook

 Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
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- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
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- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.

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- Describe tasks in Microsoft SQL Server that can improve performance.
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- Install Microsoft Dynamics CRM Using

- CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
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- Microsoft Dynamics CRM Report Authoring Extension
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- Extensions

 Review when Microsoft Dynamics CRM
- Reporting Extensions is required.

 Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
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- Base and Extension Table Merge
- Upgrade Process Phases
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- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server

Perform a Migration Using a New Instance

- Perform a Migration Using the Same Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router

of SQL Server

- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Review ways to troubleshoot and diagnose problems and monitor performance.
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- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.

- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
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- Configure Server-Side Synchronization
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- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
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- Router.

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- Microsoft Dynamics CRM Reporting
- Requirements for Microsoft Dynamics CRM Reporting Extensions
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- Upgrade the Microsoft Dynamics CRM 2011 Email Router
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- Review the role of Microsoft Dynamics CRM Language Packs.
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- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose

Computers

- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
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- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD

- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
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- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Fmail Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for

- problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Module 8: Configure an Internet-Facing Deployment

This module describes how to configure a Microsoft Dynamics CRM deployment for access over the Internet. A deployment that is configured in this way is referred to as an "Internet-Facing Deployment (IFD)."

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRMMicrosoft Dynamics CRM for Office
- Managing Emails

Outlook

- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.

- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Module 2: Install Microsoft Dynamics CRM Server

This module focuses on installing Microsoft Dynamics CRM Server. It also discusses the required components and Server requirements.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview

- Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.

- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition

- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to

- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed

- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for OutlookDescribe the base and extension table
- merge process

 Review the high-level phases of an
- upgrade process.

 Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email

- a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows
 PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
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- Describe how to update the Microsoft Dynamics CRM web addresses.
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- Base and Extension Table Merge
- Upgrade Process Phases
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- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
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- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for

- during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
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- Review the steps to create new organizations.
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- Explore why the redeployment of Microsoft Dynamics CRM is required.
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- Base and Extension Table Merge
- Upgrade Process Phases

- Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.

- Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
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- Set Up a Forward Mailbox for the Email Router
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for

- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
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- Describe the requirements for configuring an IFD.
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- Manage SQL Databases
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- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
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- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
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- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
 Microsoft Dynamics CRM for Office Outlook
- Managing Emails

Outlook

- Configure User Email Settings
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- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for

- Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
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- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs

- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
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- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- **Email Tracking and Correlation**
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule **Deployment Wizard**
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods

- Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
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- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.

- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
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- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
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- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Describe the requirements for configuring an IFD.
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- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
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- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
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- Deployment Administrators
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- Configure Access from the Internet
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- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
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- Phase 4 Upgrade and Validate the Production Deployment
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- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
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- Install the Microsoft Dynamics CRM Email Router.
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- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.

- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability
 Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
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- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server

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- Microsoft Dynamics CRM Website
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- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.

- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases

- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
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- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.Describe how to add an existing
- organization database to the deployment.

 Review Microsoft Dynamics CRM Server
- management tasks.Describe how to update the Microsoft Dynamics CRM web addresses.

- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
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- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade

- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
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- Network Load Balancing
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- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM ServerAccessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office

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- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
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- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks

- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
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- Microsoft Dynamics CRM Language Packs
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- Review the role of Microsoft Dynamics
 CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
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- Review options for installing the Email Router on multiple computers.
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- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM

- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
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- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
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 Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router

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- Configure the Email Router
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- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.

- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the

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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook
- Identify the deployment methods for installing Microsoft Dynamics CRM for
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an

- Explain the role of the Microsoft Dynamics CRM Email Router.
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- Describe the requirements for configuring an
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM

- Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
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- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
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- Examine data encryption.
- Describe the Best Practices Analyzer.
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- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability
- High-Availability Options for Other Supporting Components

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the

- Manage Data Encryption
- Best Practices Analyzer (BPA)
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- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies

- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
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- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
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- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.

- role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
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- Microsoft Dynamics CRM Reporting Extensions
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- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
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- Review the rights required to install Microsoft Dynamics CRM Server.

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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
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- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
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- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
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- Describe the Microsoft Dynamics CRM

- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
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- Manage System Jobs
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- Manage SQL Databases

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- Review the purpose of deploying

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- Upgrade the Microsoft Dynamics CRM 2011 Email Router
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- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server

- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for
- Configure Microsoft Dynamics CRM for
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for

- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft

- Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft
 Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing

- Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- High-Availability Options for Other Supporting Components

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- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
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- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM

- organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side

- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
 Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
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- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
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- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions

- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
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- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
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- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router

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- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
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- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication

- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
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- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
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- Review Microsoft Dynamics CRM license information.
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- Explore why the redeployment of Microsoft Dynamics CRM is required.
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- Base and Extension Table Merge
- Upgrade Process Phases
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- Phase 2 Establish the Test Environment
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 Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft
 Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for OutlookDescribe the base and extension table

merge process

- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
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- Describe the purpose of Microsoft Dynamics CRM mailbox records.
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS

- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM ServerAccessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs

- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
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- Describe an in-place upgrade of Microsoft Dynamics CRM.Describe a migration upgrade of Microsoft
- Dynamics CRM.

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- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
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- Email Address Approval
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- Set Up a Forward Mailbox for the Email
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
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- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook

- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
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- Review the Active Directory Federation Service configuration steps.
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- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Lab: Install Microsoft Dynamics CRM Server

Lab: Load Sample Data

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the

- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft
 Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting

- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.

- role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
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- Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
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- Manage Servers
- Configure Access from the Internet
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- Redeploy Microsoft Dynamics CRM
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- Perform a Migration Using a New Instance of SQL Server
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- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.

- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.

- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same

- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Fmail Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for

- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
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- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft

- Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
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- Identify the need to validate an upgrade of a test environment.
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- Explain the role of the Microsoft Dynamics
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- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.

- installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.

- Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
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- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
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- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- CRM Email Router.

 Install the Microsoft Dynamics CRM Email

Explain the role of the Microsoft Dynamics

- Router.Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.

- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Update Microsoft Dynamics CRM
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- Marketplace
- Examine how to manage system jobs.
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- High-Availability Options for Other Supporting Components
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- Online Licensing Model
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- Microsoft Dynamics CRM Language
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- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
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- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
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- Review the options for creating the Microsoft Dynamics CRM Server website.
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- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.

- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
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- Best Practices Analyzer (BPA)
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- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
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- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
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- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
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- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft

- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server

- Examine how to manage system jobs.
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- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability
- High-Availability Options for Other Supporting Components

Module 9: Maintain and Troubleshoot a Deployment

This module provides information on maintaining performance, troubleshooting, and updating Microsoft Dynamics CRM.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting

- Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
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- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
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 CRM using the command line.
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- Microsoft Dynamics CRM Report Authoring Extension
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- Review when Microsoft Dynamics CRM Reporting Extensions is required.
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- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the

- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
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 Extension
- Install Microsoft Dynamics CRM Reporting Extensions
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- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
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- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations

- **Production Deployment**
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
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- Router on multiple computers.
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- Test Server-Side Synchronization settings.
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- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
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- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft

- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
 Examine Windows PowerShell for
- performing deployment commands.
- Base and Extension Table MergeUpgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods

rules.

- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.

- Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
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- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft

- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
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- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
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- Using Microsoft Dynamics CRM for Outlook with Offline Capability
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- Configure user settings and options related

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- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.

- Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft
 Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.

- to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
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- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
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- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model

- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
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- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
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- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade

- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role

- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
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- Review the rights required to install Microsoft Dynamics CRM Server.
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- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring

- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
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- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.

- Test Email Configuration
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- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.

- Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email RouterPlan the Upgrade of Microsoft Dynamics
- CRM 2011 for Outlook
 Upgrade Microsoft Dynamics CRM 2011
- for Outlook

 Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.

- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM

- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
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- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Describe the upgrade of Microsoft Dynamics CRM for Outlook.

Module 6: Email Management

This module describes management topics that are common to each of the email processing methods and the email processing methods.

Lessons

- Microsoft Dynamics CRM Offerings
- Email Processing

- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
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- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
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- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
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- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line

- Marketplace
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- Online Licensing Model
- Supporting Technologies
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- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the

- On-Premises Licensing Model
- Online Licensing Model
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- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
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- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for

- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension

- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.

- performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
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- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.

- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test EnvironmentPhase 3 Upgrade and Validate the Test
- EnvironmentPhase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
 Review the high-level phases of an
- upgrade process.

 Explain the need for a test environment.
- Identify the need to validate an upgrade of

- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
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- Configure Server-Side Synchronization.
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- Review the Active Directory Federation Service configuration steps.
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- a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
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- Review options for installing the Email Router on multiple computers.
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for

- Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM

- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language
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- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for

- Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
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- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics

- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router

- Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
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 Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
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- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition

- marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
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- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the

- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
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- Review the requirement to approve email addresses.
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- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
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- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Requirements for Configuring an Internet-Facing Deployment
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- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
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- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
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- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router

- installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
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- View License Information
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- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
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- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance

- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
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- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
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- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
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- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Module 3: Install Microsoft Dynamics CRM Reporting Extensions

This module describes the role of Reporting Extensions and provides an overview of the report types that are available in Microsoft Dynamics CRM.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager

- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
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- Install the Microsoft Dynamics CRM Fmail Router.
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for

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- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
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- Email Address Approval
- Overview of the Email Router
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- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
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- Install the Email Router on Multiple Computers
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- Configure Server-Side Synchronization
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- Examine the email synchronization options.
- Review the requirement to approve email addresses.
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- Review troubleshooting tips.
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- Microsoft Dynamics CRM for Outlook Overview
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- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
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- Accessing Microsoft Dynamics CRM
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- Microsoft Dynamics CRM Reporting Extensions
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- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
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- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
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- Microsoft SQL Server Requirements
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- Microsoft Dynamics CRM Website
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- Describe the hardware and software requirements for the Microsoft SQL Server.
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- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.

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- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
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- Manage System Jobs
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- Examine how to manage system jobs.
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- Other SQL Server High-Availability Solutions
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- Synchronization.
- Configure Server-Side Synchronization.
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- Installation Requirements
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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
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- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
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- Create a New Organization
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- Upgrade the Microsoft Dynamics CRM Edition
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- Import Organizations
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- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
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- Upgrade Process Phases
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- Perform a Migration Using the Same Instance of SQL Server
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- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
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- Perform a Migration Using the Same Instance of SQL Server
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Explore why the redeployment of Microsoft

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Examine Windows PowerShell for performing deployment commands.

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- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed

- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
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- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
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- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
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- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
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- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
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- Microsoft SQL Server Requirements

- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Fmail Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
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- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
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- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
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- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
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- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
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- Review troubleshooting tips.
- Describe the role of Server-Side

- during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
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- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
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- Create a New Organization
- Manage Existing Organizations
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- Configure Access from the Internet
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- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
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- Upgrade Process Phases

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- Configure Server-Side Synchronization.
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- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
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- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules

- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router

- recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed

- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration ontions
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an

- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for

- during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment

- Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM ServerAccessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office

- Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
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- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Lab: Configure Tracing

After completing this module, students will be able to:

- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration

- Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics
 CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft
 Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensina Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software

- options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace

- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.

- requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring
 Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.

- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

Lab: Install Reporting Extensions

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.

- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for

- Base and Extension Table Merge
- Upgrade Process Phases

Environment

- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
 Phase 3 Upgrade and Validate the Test
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.

- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
 CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers

- Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
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- Explain the role of the Microsoft Dynamics CRM Email Router.
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- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.

- Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators

Manage Servers

- Create a New Organization
- Manage Existing Organizations
- Configure Access from the Internet

- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Examine how to configure tracing.
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- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM

- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting

- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
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- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
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- Email Address Approval
- Overview of the Email Router

- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
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- Installation Troubleshooting
- Post-Installation Tasks
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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing

- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation

- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
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- Review troubleshooting tips.
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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for
- Configure Microsoft Dynamics CRM for
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for

- Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
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- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011
 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.

- Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.
- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRMMicrosoft Dynamics CRM for Office
- Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting

- Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
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- Install Active Directory Federation Services
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- Microsoft Dynamics CRM Server

- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
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- Describe the purpose of Microsoft Dynamics CRM mailbox records.
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 CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
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- Review the purpose of deploying forwarding rules.
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- Configure Server-Side Synchronization.
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- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook
 Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for

- Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
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- Requirements for Microsoft Dynamics
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- Microsoft Dynamics CRM Report Authoring Extension
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Module 4: Manage Microsoft Dynamics CRM with the Deployment Manager

- Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
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- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
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- Extensions
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- upgrade process.Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.

This module explains how you can redeploy Microsoft Dynamics CRM and use the Microsoft Dynamics CRM Deployment Manager to carry out deployment-wide administration tasks.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
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- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
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- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
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- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
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- Email Address Approval
- Overview of the Email Router
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- Configure the Email Router
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- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization ontions
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- requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics
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- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
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- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
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- Deployment Administrators
- Create a New Organization
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- Administer the Deployment Using Windows
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- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
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- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
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- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases

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- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
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- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
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- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD
- Identify the steps to install Active Directory Federation Service.
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- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
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- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
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- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.

- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
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- Perform a Migration Using the Same Instance of SQL Server
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- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
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- Examine the Microsoft Dynamics marketplace.
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
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- Supporting Technologies
- Microsoft Dynamics CRM Server
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- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
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- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
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- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
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- Review the purpose of deploying forwarding rules
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- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft
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- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
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- Deployment Administrators
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- Upgrade the Microsoft Dynamics CRM Edition
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- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
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- Review Microsoft Dynamics CRM license information
- Describe the Microsoft Dynamics CRM Edition upgrade options.
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- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
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- Server.
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Perform a Migration Using the Same

- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Instance of SQL ServerPerform a Migration Using a New Instance of SQL Server

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- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
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- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
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- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
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- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
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- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM

- Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
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- Review the purpose of deploying forwarding rules.
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- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
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- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
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- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions

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- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.

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- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
 Examine Windows PowerShell for
- performing deployment commands.

 Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
 Describe the base and extension table
- merge process

 Review the high-level phases of an

upgrade process.

- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production

- Office Outlook.
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- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
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- High-Availability Options for Other Supporting Components

Lab: Install the Email Router

Lab: Configure the Email Router

Lab : Configure Server-Side Synchronization

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.

- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
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- Describe the licensing model and client access license types.
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- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.

- Examine the two types of Reporting Services reports.
- Describe the Deployment Manager and the role of deployment administrators.
- Identify considerations before starting an upgrade.
- Describe the email processing options in Microsoft Dynamics CRM.
- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Provide a background to claims-based authentication.
- Describe how to change Microsoft Dynamics CRM service accounts.
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- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
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- Describe the VSS Writer Service for Microsoft Dynamics CRM.
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Module 10: High-Availability Options

This module provides a high-level overview of the high-availability options.

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- Microsoft Dynamics CRM Server Requirements
- Microsoft Dynamics CRM Reporting Overview
- Deployment Manager
- Upgrade Considerations
- Microsoft Dynamics CRM for Outlook Overview
- Overview of Claims-Based Authentication
- Service Accounts
- Install Microsoft Dynamics CRM Server on Multiple Computers
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- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics
 CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.

- **Production Deployment**
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.

- deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
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- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook
 Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for

- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
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- Install Microsoft Dynamics CRM for
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IED
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
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- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
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- Microsoft Dynamics CRM Website
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- Configure Claims-Based Authentication
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- Post-Installation Tasks
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- Deploy Microsoft Dynamics CRM Online
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
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- Import Organizations
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- Review the steps to create new organizations.
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- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.

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- Microsoft Dynamics CRM Language Packs
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- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
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- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
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- Describe the role of Server-Side Synchronization.
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- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
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- **Production Deployment**
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.

- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
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- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability
- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM

- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
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- Review the role of Microsoft Dynamics CRM Reporting Extensions.
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- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
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- Manage Servers
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- Update Web Addresses
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- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
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- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.
- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.
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- Install Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
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- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD
- Describe the requirements for configuring an IFD.

- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.
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- Update Microsoft Dynamics CRM
- Manage Data Encryption
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- Marketplace
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- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
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- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview
- Describe the licensing model and client access license types.

- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft
 Dynamics CRM Server in a Microsoft
 Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
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- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.

- Deployment Administrators
- Create a New Organization
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- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 Prepare to Upgrade
- Phase 2 Establish the Test Environment
- Phase 3 Upgrade and Validate the Test Environment
- Phase 4 Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
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- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft

- Dynamics CRM Email Router.
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
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- Other SQL Server High-Availability

Solutions High-Availability Options for Other Supporting Components

Further Information:

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