Microsoft Dynamics CRM 2013 Customization and Configuration

Duration: 3 Days **Course Code: M80542** **Version: A**

Overview:

This course describes the techniques required to customize Microsoft Dynamics CRM to meet the specialized needs of businesses. The topics covered include security; creation and configuration of entities; design of forms views and charts; auditing and solutions. The course describes each topic and how each topic relates to the other topics to produce a full configured, effective solution.

Target Audience:

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

Objectives:

- Design and implement strategies for the creation of Business Units and Security Roles
- Configure Microsoft Dynamics CRM Users and Teams
- Describe the principles of customizing the system
- Create and configure fields for both custom and system entities
- Create and configure custom entities, including standard and activity entities
- Design, create and configure relationships between entities
- Create and configure Views, Charts and Forms for both system and custom entities
- Implement Field Security and Access Team Templates in Microsoft Dynamics CRM
- Design, create and configure Solutions in Microsoft Dynamics CRM
- Design, create and configure Business Rules and Business Process Flows to guide users through their work

Prerequisites:

- A working knowledge of how to use Microsoft Dynamics CRM 2011. It is recommended, but not required, that individuals have completed Microsoft Dynamics CRM 2011 or 2013 applications training. Because this training material focuses on customizing database entities, attributes, relationships, and mappings, it is recommended that individuals have a basic understanding of Microsoft SQL Server and relational database functionality.

Content:

Module 1: Introduction to Customizing Microsoft Dynamics CRM 2013

- Customization or Development
- Microsoft Dynamics CRM Solutions
- Introduction to Entity Customization
- Lab: Create a Solution and publisher

Module 2: Building a Security Model in Microsoft Dynamics CRM 2013

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

Module 3: Customizing Entities

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

Module 4: Customizing Fields

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

Module 5: Managing Relationships

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

Module 6: Customizing Forms

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

Module 7: Configuring Business Rules

- Configure Business Rules
- Lab: Create a Business Rule

Module 8: Customizing Views

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

Module 9: Customizing Charts and Dashboards

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

Module 10: Additional Security Options

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

Module 11: Business Process Flows

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

Additional Information:

To help you prepare for this exam, Microsoft recommends that you have hands-on experience with the product and that you use the specified training resources. These training resources do not necessarily cover all topics listed in the "Skills measured" section.

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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