

80542 - Customisation and Configuration in Microsoft Dynamics CRM 2013

Duration: 3 days

Overview:

This course describes the techniques required to customise Microsoft Dynamics CRM to meet the specialised 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 customers 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.

Pre-requisites:

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 customising database entities, attributes, relationships, and mappings, it is recommended that individuals have a basic understanding of Microsoft SQL Server and relational database functionality.

Module 1: Introduction to Customising Microsoft Dynamics CRM 2013

Lessons

- Customisation or Development?
- Microsoft Dynamics CRM Solutions
- Introduction to Entity Customisation

Lab : Create a Solution and publisher

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

Lessons

- 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: Customising Entities

Lessons

- Entity Customisation 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: Customising Fields

Lessons

- Field Data Types
- Field Display Formats
- Field Properties
- Customise Existing Fields
- Configure Option Sets
- Status and Status Reason Fields
- Delete Fields

Lab : Create and Modify a Global Option Set

Module 5: Managing Relationships

Lessons

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

Lab : Create New Relationships

Lab : Customise Relationship Mappings

Module 6: Customising Forms

Lessons

- Form Customisation Overview
- Create and Modify Forms
- Quick Create and Quick View Forms
- Manage Multiple Forms
- Mobile Clients

Lab : Modify Form Layout and Add Fields

Lab : Create a Role-Based Form for the Competitor Entity

Module 7: Configuring Business Rules

Lessons

- Configure Business Rules

Lab : Create a Business Rule

Module 8: Customising Views

Lessons

- View Customisation Concepts
- System Views
- Create Custom Views/Remove Unwanted Views

Lab : Modify a Quick Find View

Lab : Create Custom Views

At Course Completion:

After completing this course, students will be able to:

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

Module 9: Customising Charts and Dashboards

Lessons

- 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

Lessons

- Field Security
- Access Team Templates
- Auditing Overview

Lab : Configure Field Security

Lab : Create and Configure an Access Team Template

Module 11: Business Process Flows

Lessons

- Business Process Flows

Lab : Create a Multi-Entity Business Process Flow