MS Dynamics CRM Functional

Course description

Microsoft Dynamics CRM is a customer relationship management software package developed by Microsoft. Out of the box, the product focuses mainly on Sales, Marketing, and Service (help desk) sectors. Designed for server client application, this package supports web service interfaces extensively. For a sales professional or a business manager, it is quite precious to get a trained with Microsoft Dynamics CRM training.

Student Take away
- Study Material
- Learning stuff
- Sample project for practice

MS Dynamics CRM Functional Online Training Curriculum

MSCRM Basics
- MSCRM Introduction
- MSCRM Architecture, Layers and Technology
- MSCRM Basic Navigations
- Accounts, Contacts, Activities

Sales & Marketing Management
- Lead Management
- Opportunity Management
- Product Management
- Campaign Management
- Marketing List Management
- Quotes, Order, Invoice Management
- Competitors and Goal Management
- Sales Literature and Marketing Materials

Service Management
- Case Management
- Service Management
- Contract Management
- Knowledge Base Article Management

Business Management
- Fiscal Year, Business Closures
- Goal Metrics
- Facilities and Equipment's

Business Management continues...
- Queue management (Configuring POP3, SMTP, Gmail)
- Resource Group
- Quota, Sales Territories, Site Management
- Subjects, Connection & Relationship Roles

Administration
- System Settings, Server Settings
- Business Unit, Security Roles creations
- Field Security Profiles
- Team, User Creation
- Access and Privileges
- Auto Numbering, Languages Settings

Database Management
- Data Imports
- Data Maps
- Templates of Data Imports
- Duplicate Detection Settings, Rules, Jobs
- Bulk Deletion

Customization & Solutions
- Customization of System Entity, Custom Entity
- Entity Creation, Attribute Creations
- Form Creation, Section, Tabs, I frames,
- Relationship (1:N, N:1, N:N)
- Views creation
- Templates creation (Email, Contract, KB)
- Understanding Solutions
- Import & Export Customization

Document Management
- Document Management
- Share point Document Locations
- Components Management

Report Management
- Dashboard Creations
- Customizing Reports

Import and Exports of Reports

➢ **Customizing RDL files with Business Intelligence Studio (Basic)**

Goal Management
- Goal Audit Settings
- Entity and Field Audit Settings
- Audit Log Management

Goal Management continues...
- Audit Summary

Workflow Creations
- Process Creations
- Process Triggers, Loops, Branch, Chain
- Process Export, Import and Publish
- Workflow Rules

Course Snapshots

➢ **Marketing Automation in Microsoft Dynamics CRM 2011**

Introduction
- Benefits of Closed Loop Marketing
- Creating and Using Marketing Lists
- Marketing Campaigns and Quick Campaigns
- Quick Campaigns
- Introduction to Marketing Campaigns
- Creating a Marketing Campaign
- Creating and Using Campaign Templates
- Importing Leads

Implementing and Managing Marketing Campaigns
- Campaigns, Campaign Activities and Marketing Lists
- Creating and Using Email Templates
- Sales Literature, Products and Price Lists
- Distributing Campaign Activities
- Capturing and Viewing Campaign Responses
- Working with Campaign Responses

Analysis, Reporting and Goals
- Analyzing Marketing Information with Lists, Views and Charts
- Working with Reports
- Creating and Managing Marketing Goals
- Creating Charts
- Customizing and Working with Dashboards

➢ **Sales Management in Microsoft Dynamics CRM 2011**

Introduction
- Overview of the Sales Process in Microsoft Dynamics CRM
- Core Records in the Sales Process
- Tracking Competitors and Managing Sales Literature
- Working with Leads
- Working with Opportunities
- Sales Processes, Workflows and Dialogs

Working with the Product Catalog
- The Product Catalog and the Sales Process
- Unit Groups
- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists

Sales Order Processing
- The Microsoft Dynamics CRM Sales Order Process
- Opportunities, Quotes, and the Sales Process
- Working with Orders
- Working with Invoices

Analysis, Reporting and Goals
- Analyzing Sales Information with Lists, Views and Charts
- Working with Reports
- Exporting Sales Information to Microsoft Office Excel
- Creating and Managing Sales Goals
- Creating Charts
- Dashboards

➢ **Service Management in Microsoft Dynamics CRM 2011**

Introduction
- Getting Started with Service Management
- Cases and the Service Management Process
- Queues and Contracts in Service Management
- Working with Cases in the Case Grid

Working with Cases and Contracts
- Creating Case Records
- Working with Cases
- Contracts and Contract Templates
- Creating and Working with Contracts
- Using Contracts with Cases

Using the Knowledge Base
- Article Templates
- Creating, Approving and Publishing Articles
- Using and Searching the Knowledge Base
- Cases and Knowledge Base Articles

Working with Teams and Queues
- Introduction to Teams
- Introduction to Queues
- Creating and Managing Queues

Working with Teams and Queues continues...
- Working with Queues and Queue Items
- Using Workflows with Queues

Analysis, Reporting and Goals
- Service Management Reports
- Service Management Charts and Dashboards
- Goal Management for Service

➢ **Service Scheduling in Microsoft Dynamics CRM 2011**

Introduction
- Service Scheduling Overview
- Service Scheduling Scenarios
- Service Scheduling Process
- Working with Service Activities and the Service Calendar
- Closing, Cancelling, or Rescheduling a Service Activity
- Using Charts and Reports to Analyze Service Activities

Advanced Topics
- Understanding the Service Activity Scheduling Engine
- Resources, Services and Selection Rules
- Incorporating Customer Preferences
- Resource and Service Capacity Requirements
- Understanding Sites and Same-Site Requirements

➢ **Microsoft Dynamics CRM 2011 Customization and Configuration**

Business Units and Security Roles
- Business Units
- Managing Business Units
- Security Features

Configuring Users and Teams
- User Management Overview
- Adding and Maintaining User Accounts
- Team Configuration

Customizing Microsoft Dynamics CRM Overview
- Customization Methodology
- Who can Customize Microsoft Dynamics CRM?
- Types of Customizations
- Types of Customizations - Solutions

Customizing Fields
- Customization Concepts
- Field Data Types

Customizing Fields continues...
- Field Properties
- Creating Fields
- Creating Option Sets

Customizing Entities
- Entity Concepts
- Modifying Custom Entities

Customizing Relationships and Mappings
- Types of Entity Relationships
- Creating Entity Relationships
- Entity Mapping

Customizing Forms, Views and Charts

Basic UI Customization Capabilities
- View Customization Overview
- Charts
- Form Customization Overview
- Other Form Objects
- Creating New Forms

Configuring Field Security
- Field Security Scope
- Field Security and Other Security Methods

Configuring Auditing
- Enabling Auditing
- Viewing Audit Data
- Managing Audit Partitions

Configuring Solutions
- Solutions Review
- Exporting and Importing Unmanaged Solutions
- Exporting and Importing Managed Solutions