MS Dynamics CRM Technical

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 Technical Online Training Curriculum

Microsoft Dynamics CRM Concepts

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Microsoft Dynamics CRM records
- Application navigation

Introduction to Customizing Microsoft Dynamics CRM 2016

- Customer records
- Addresses
- Personal options
- Customization or Development
- Introduction or Entity Customization

Lab: Create a Solution and publisher

Building a Security Model in Microsoft Dynamics CRM 2016

- 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

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

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

Introduction to Sales Management

- Customer Scenarios
- Basic Record Types

Module 7: Lead Management

- Lead to Opportunity Process Form and Process Ribbon
- Convert Activity Records to Leads
- Qualifying and Disqualifying Leads
- Create, Maintain, and Use Sales Literature
- Create, Maintain, and Use Competitors

Lab: Create and Disqualify a Lead

Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status

Lab:

- Managing Sales Opportunities
- Create, work with, close, and reopen Opportunity records
- Describe the different statuses of an opportunity
- Use the assign functionality in Microsoft Dynamics to assign opportunities to other users
- Manage opportunities from system views

Working with the Product Catalog

- The Microsoft Dynamics CRM Product Catalog
- Unit Groups

Working with the Product Catalog continues...

- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists
- Currency Management
- Creating a Price List

Lab:

- Managing the Product Catalog
- Create Currency
- Create a Unit Group associated with the Currency
- Create a Product
- Create a Price List and Price List Item Tied to the Currency

Sales Order Processing

- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Orders
- Working with Invoices

Lab: Sales Order Process

Metrics and Goals

- Configuring Goal Metrics
- Configuring Fiscal Periods
- Creating and Assigning Goal Records
- Creating and Recalculating Parent and Child Goal Records
- Creating a Roll-up Query

Lab:

- Goal Management for Individuals
- Implement a Goal Metric

Managing Relationships

- Types of Entity Relationships
- Create Entity Relationships1: N
- Relationship Behaviour
- Field Mappings in 1: N Relationships
- Connections and Connection Roles

Lab: Create New Relationships Lab
Customize Relationship Mappings

Customizing Forms

- Form Customization Overview
- Create and Modify Forms
- Quick Create and Quick View Forms

- Manage Multiple Forms and Mobile Clients

Customizing Forms continues....

Lab: Modify Form Layout and Add Fields Lab
Create a Role-Based Form for the Competitor entity.

Customizing Views
- View Customization Concepts
- System Views
- Create Custom Views
- Remove Unwanted Views

Lab: Modify a Quick Find View
Lab: Create Custom Views

Configuring Business Rules
- Configure Business Rules

Lab: Create a Business Rule

Service Scheduling
- Service Scheduling Scenarios
- Service Scheduling Terminology
- Service Scheduling Process
- Resources, Services and Selection Rules
- Include Customer Preferences
- Understand Sites and Same-Site Requirements
- Manage Business Closures
- Explain the Service Activity Scheduling Engine
- Working with Service Activities and the Service Calendar
- Close, Cancel, or Reschedule a Service Activity

Lab:
- Schedule a Service by Using a Same-Site Requirement
- Create a Service Activity based on a Same-Site Requirement Service

Sales Analysis
- Running Built-in Reports
- Exporting Sales Information to Excel
- Working with Charts and Dashboards
- Working with System Charts from the Opportunity List
- Working with Dashboards
- Create a New Dashboard in the Workplace
- Sharing DASHBOARDS, Charts and Advanced Find Queries

Lab:
- Create a New Personal, Sales Dashboard

- Create an advanced find query
- Create a chart

Sales Analysis continues....

- Create a dashboard, and add the advanced find query and chart to it
- Share the dashboard

Additional Security Options

- Field Security
- Access Team Templates
- Auditing Overview

Lab: Configure Field Security
Lab: Create and Configure an Access Team Template

Implementing Business Processes

- Overview of Work-flow
- Overview of Dialogues
- Setting up Custom Work-flow Activity Assemblies
- Demonstration: Configuring a Custom Work-flow Activity
- Creating Custom Work-flow Activities
- Debugging Custom Work-flow Activities

Plug-in

- Objectives
- Introduction
- Overview of Plug-ins
- Developing Plug-ins
- Register and Deploy Plug-ins

Lab: Creating a Plug-in

Application Event Programming

- Objectives
- Introduction
- Using Jscript Libraries
- Form and Field Events
- Form Types
- Form Event Handler Execution Context
- Setting Event Dependencies
- Pass Parameters
- Using Best Practices in Writing Client-Side Code
- Debugging Client-Side Code
- Summary
- Test Your Knowledge
- Quick Interaction: Lessons Learned
- Solutions