

Introduction to Microsoft Dynamics CRM 2011

Length: 1 Day

Overview

This one-day instructor-led course provides an introduction to Microsoft Dynamics CRM 2011. The course focuses on the user interface and working with the application and provides a foundation for other Microsoft Dynamics CRM 2011 courses. The course describes Microsoft Dynamics CRM concepts, the Web interface, the Microsoft Dynamics CRM for Outlook interface, searching, and reporting.

Audience Profile

This course is intended for individuals who plan to implement, use, maintain, or support Microsoft Dynamics CRM in their organization. The course is intended for anyone who wants to gain foundational knowledge of Microsoft Dynamics CRM 2011.

At Course Completion

After completing this course, students will be able to do the following:

- Describe at a high level key Microsoft Dynamics CRM concepts.
- Explain how customer records, addresses, notes, attachments, connection records, and activities are recorded in Microsoft Dynamics CRM and how to configure personal options.
- Work with records and views.
- Use Microsoft Dynamics CRM for Outlook to track and synchronize items and manage offline capability.
- Search and report on Microsoft Dynamics CRM data.

Prerequisites

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

- Microsoft Windows operating systems
- Microsoft Outlook
- Microsoft Word
- Microsoft Excel

Course Content

Lesson 1: Microsoft Dynamics CRM

Concepts

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Security
- Microsoft Dynamics CRM records
- The Get Started pane
- Application navigation
- Microsoft Dynamics CRM Help and the Resource Center
- Lab : Navigate Microsoft Dynamics

CRM

Lesson 2: Working with the Application

- Customer records
- Addresses
- Notes and attachments
- Connections
- Activities
- Personal options
- Lab : Work with Core Records and Personal Options

Lesson 3: Working with Records

- Views
- Record ownership
- Sharing records

Deleting and editing records
Import records
Mail merge with Microsoft Word
Lab : Import Contacts
Lab : Mail Merge

Lesson 4: Microsoft Dynamics CRM for
Microsoft Office Outlook

Integration with Outlook
Tracking Outlook items
Synchronizing records
Conditional formatting
Offline capability
Lab : Tracking Records
Lab : Configure Outlook
Synchronization Filters
Lab : Offline Capability

Lesson 5: Searching and Reporting

Search using quick find
Search using Advanced Find
Manage saved views
Export to Excel
Default reports
The Report Wizard
Overview of charts and dashboards
Lab : Search for Records
Lab : Export Records
Lab : Reports
