

Microsoft Dynamics CRM 2011 Customization and Configuration

Length: 2 Days

Overview

The student will learn techniques required to customize Microsoft Dynamics CRM to meet the specialized needs of businesses. Topics covered include security; creation and configuration of entities; design of forms views and charts; auditing and solutions.

Who Should Attend

This course 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.

Course Content

Lesson 1: Business Units and Security Roles

- Business Units
- Managing Business Units
- Security Features
- Lab : Maintaining Business Units

Lesson 2: Configuring Users and Teams

- User Management Overview
- Adding and Maintaining User Accounts
- Team Configuration
- Lab : Managing User Accounts
- Lab : Managing Teams

Lesson 3: Customizing Microsoft Dynamics CRM Overview

- Customization Methodology
- Who can Customize Microsoft Dynamics CRM?
- Types of Customizations
- Types of Customizations - Solutions
- Lab : Creating a Solution

Lesson 4: Customizing Fields

- Customization Concepts
- Field Data Types
- Field Properties
- Creating Fields
- Creating Option Sets
- Lab : Creating a Custom Field
- Lab : Creating and Using a Separate Option Set

Lesson 5: Customizing Entities

- Entity Concepts

- Modifying Custom Entities
- Lab : Creating Custom Entities
- Lab : Modifying Entities

Lesson 6: Customizing Relationships and Mappings

- Types of Entity Relationships
- Creating Entity Relationships
- Entity Mapping
- Lab : Create a Manual N:N Relationship
- Lab : Create a Mapping

Lesson 7: Customizing Forms, Views and Charts

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

Lesson 8: Configuring Field Security

- Field Security Scope
- Field Security and Other Security Methods
- Lab : Creating and Testing a Field Security Profile
- Lab : Modify Field Security

Lesson 9: Configuring Auditing

- Enabling Auditing
- Viewing Audit Data
- Managing Audit Partitions
- Lab : Configure Auditing

Lesson 10: Configuring Solutions



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Solutions Review
Exporting and Importing Unmanaged
Solutions
Exporting and Importing Managed
Solutions
Lab : Unmanaged Solutions
Lab : Exporting and Importing
Managed Solutions

