



7. Microsoft Training

7.5 Dynamic CRM

Duration: 60 Lectures

Course Content:

1. Introduction

- 1.1. Sales Process
- 1.2. Leads
- 1.3. Opportunities
- 1.4. Competitors
- 1.5. Products
- 1.6. Quotes, Orders and Invoices
- 1.7. Goals

2. Marketing

- 2.1. Marketing Lists
- 2.2. Campaigns
- 2.3. Sales Literature
- 2.4. Quick Campaigns

3. Service

- 3.1. Services
- 3.2. Service Calendar
- 3.3. Cases
- 3.4. Knowledge Base
- 3.5. Contracts

4. Administration

- 4.1. Creating and managing Business Units, Users and Teams
- 4.2. Privileges, Access Levels and Security Roles



- 4.3. Creating and managing Security Roles
- 4.4. Auto Numbering and System Settings
- 4.5. Installing MUI Language Packs

5. Settings & Configuration

- 5.1. Business Management
- 5.2. Sites, Sales Territories, Facilities and Resource Groups
- 5.3. Working with Multi Currency
- 5.4. System Queues and Custom Queues
- 5.5. Services and Business Closures
- 5.6. Fiscal Year Settings and Quotas
- 5.7. Subjects
- 5.8. Connections

6. Data Management

- 6.1. Duplication Detection Settings, Rules and Jobs
- 6.2. Bulk Record Deletion
- 6.3. Data Maps and Imports
- 6.4. Product Catalog
- 6.5. Understanding the Product Catalog
- 6.6. Unit Groups
- 6.7. Adding Products
- 6.8. Creating Price Lists
- 6.9. Creating Discount Lists
- 6.10. Using Deployment Manager
- 6.11. Redeploying Dynamics CRM

7. Entity Customization

- 7.1. Basic Form Customizations
- 7.2. Basic UI Customization Capabilities
- 7.3. Form Customization – Working with Tabs, Sections, Fields and IFrames
- 7.4. Introduction to Application Event Programming
- 7.5. Using Form and Field Events



8. MS CRM Entity Model

- 8.1. Customization Concepts – Entity Types and Attributes
- 8.2. Creating Custom Entities and Attributes

9. Relationships, Views and Advanced Views

- 9.1. Types of Relationships
- 9.2. Relationship Behaviors
- 9.3. Creating Entity Relationships
- 9.4. Entity Mapping

10. Views and Advanced Views

- 10.1. Public, Personal and System Views
- 10.2. View Customizations – Common Tasks
- 10.3. Advanced Views Customizations

11. Form Scripting

- 11.1. Client side scripting using Java Script
- 11.2. Working with I Frames
- 11.3. Working with Web Resources
- 11.4. Report Wizard, Scheduling and Exporting Reports
- 11.5. Working with Dash Boards

12. Processes (Workflows & Dialogs)

- 12.1. Overview of Workflow
- 12.2. Creating Workflows steps through Workflow Designer
- 12.3. Overview of Dialogs
- 12.4. Creating Dialog Pages, Prompt and Response
- 12.5. Working with Input Parameters in Dialogs



13. Ribbon Customizations

- 13.1. Creating & Hiding Ribbon Elements
- 13.2. Enabling & Disabling Ribbon Elements

14. Working with Site Maps

- 14.1. Introduction to Solutions
- 14.2. Managed & Unmanaged Solutions
- 14.3. Importing & Exporting Solutions

15. Advanced Client Side Scripting

- 15.1. Working with ODATA
- 15.2. Working with REST
- 15.3. Working with SOAP

16. CRM Web Services

- 16.1. Introduction to Web Services
- 16.2. Query Expression & Query Attribute
- 16.3. Request & Response

17. Plugins

- 17.1. The Event Execution Pipeline
- 17.2. IPluginExecutionContext Interface
- 17.3. Developing Plugins
- 17.4. Deploying Plugins
- 17.5. Debugging Plugins

18. Custom Workflows

- 18.1. Developing Custom Workflow Activities
- 18.2. Deploying Custom Workflow Activities
- 18.3. Debugging Custom Workflow Activities