

# Microsoft Dynamics CRM– Course Content

## PART I – Applications in CRM

- Introduction to Microsoft Dynamics CRM
- Sales Process
  - Leads
  - Opportunities
  - Competitors
  - Products
  - Quotes, Orders and Invoices
  - Goals
- Marketing
  - Marketing Lists
  - Campaigns
  - Sales Literature
  - Quick Campaigns
- Service
  - Services
  - Service Calendar
  - Cases
  - Articles
  - Contracts

## PART II – Administration, Settings & Configuration

- Administration
  - Creating and managing Business Units, Users and Teams
  - Privileges, Access Levels and Security Roles
  - Creating and managing Security Roles
  - Auto Numbering and System Settings
- Settings & Configuration
  - Business Management
  - Sites, Sales Territories, Facilities and Resource Groups
  - System Queues and Custom Queues
  - Services and Business Closures

- Fiscal Year Settings and Quotas
- Connections
- Data Management
- Duplication Detection Settings, Rules and Jobs
- Bulk Record Deletion
- Data Maps and Imports
- Product Catalog
- Understanding the Product Catalog
- Unit Groups
- Adding Products
- Creating Price Lists
- Creating Discount Lists

### **PART III – Basic and Advanced Customizations in MS Dynamics CRM**

- Entity Customization
  - Basic Form Customizations
  - Basic UI Customization Capabilities
  - Form Customization – Working with Tabs, Sections, Fields and IFrames
  - Introduction to Application Event Programming
  - Using Form and Field Events
- MS CRM Entity Model
  - Customization Concepts – Entity Types and Attributes
  - Creating Custom Entities and Attributes
- Relationships, Views and Advanced Views
  - Types of Relationships
  - Relationship Behaviors
  - Creating Entity Relationships
  - Entity Mapping
- Views and Advanced Views
  - Public, Personal and System Views
  - View Customizations – Common Tasks
  - Advanced Views Customizations
- Form Scripting
  - Client side scripting using Java Script
  - Working with IFrames

- Working with Web Resources
- Report Wizard, Scheduling and Exporting Reports
- Working with Dash Boards

## **PART IV – Extending MS Dynamics CRM**

- Processes(Workflows & Dialogs)
  - Overview of Workflow
  - Creating Workflows steps through Workflow Designer
  - Overview of Dialogs
  - Creating Dialog Pages, Prompt and Response
  - Overview of Business Process Flow
- Introduction to Solutions
  - Managed & Unmanaged Solutions
  - Importing & Exporting Solutions
- Plugins
  - Developing Plugins
  - Deploying Plugins
- Custom Workflows
  - Developing Custom Workflow Activities
  - Deploying Custom Workflow Activities

