Microsoft CRM Training

MS CRM 2015

Microsoft Dynamics CRM

Objectives:

The program will help Participants to understand Microsoft Dynamics CRM 2015
- Understand Microsoft Dynamics CRM 2015
- Explore OOB (Out of Box Feature) of Microsoft Dynamics CRM 2015
- Customize and Configure Microsoft Dynamics CRM 2015
- Extend MS CRM as xRM
- Manage the MS CRM Implementation Project

Approach/Methodology:

- All session are hands-on session with adequate theory during session
- Q&A would be throughout sessions.
- Each new session would be start with Q&A from last session(s).

Course Outline:

Overview

- Concept of CRM
  - What is CRM & What is MS Dynamics CRM
  - Why CRM (Benefits)
  - Business Benefits of MS Dynamics CRM
  - Q&A
- Overview of General Module and associated System Entity like Account, Opportunity etc
  - Marketing
  - Sales
  - Service
  - Activity Management
  - Goal Management

- Architecture of MS Dynamics CRM
  - Brief on Architecture
    - Role of various Servers
      - Application Server,
      - Platform Server,
      - Database Server
      - Exchange Server / POP / SMTP
      - Active Directory (AD)
  - Brief on Components
    - CRM Servers and Client
    - Dot NET Tech
    - Email Router
    - SSRS (Report Service)
    - Outlook Client
    - Web Client
  - Access Mode
    - Online
    - Offline
  - Q&A

Configuration

- Compare features between CRM 2015 and CRM 2011
- Configuration
  - Business Unit
    - Structure
    - Impact of Business Unit in CRM
    - Do's and Don'ts (Best Practices)
    - Lab
  - Users
    - What is User
    - Brief about Licensing
    - How to create User
    - Bulk Creation
    - Lab
  - Teams
    - What is Team
    - Why and How
    - Various Type of Team
    - Access Team
    - Best Practices
    - Lab
  - User Reporting Structure
    - How to implement
    - Why (Benefits)
  - Data ownership
    - User Owned
    - Team Owned
    - Org Owned
  - Hierarchical Access in MS Dynamics CRM
    - Org Level
    - Parent Child BU Level
    - BU Level
    - User Level
    - None
    - Lab
  - Security Roles
    - How to Create
    - Change Roles
    - Assign/Manage Roles for User
    - Best Practices
    - Lab
  - Field level Security

- Configuration
  - Flow UI Setup
    - How to setup
    - Lab
  - Chart (OOB)
    - How to Create Chart
    - Lab
  - Dashboard
    - How to configure Dashboard
    - How to develop report using CRM GUI Editor
    - Lab
  - Currency Conversion Rate (Multi-Currency)
    - Brief about Multi-Currency
    - Necessity and Benefit of Multi Currency
    - Lab
  - Usage of MUI Packs
    - Look and Feel using MUI Packs
  - Multi Organization Concept in MS Dynamics CRM
    - What and Why
    - Advantages/Benefits
    - Lab*
  - Q&A

Customization

- Customization
  - What is customization
  - Why customization
  - Which can be customized
  - Entity
    - How to Create
    - How to modify
    - How to delete
    - Do's and Don'ts
    - Lab
  - Form Customization
  - Event Programming (using client side language)
    - Type of Form
    - Type of event
    - Dependency
    - Lab
  - View Customization
    - Lab
  - How to Add/modify/delete attribute
    - Lab
  - Impact of attribute change
    - Lab
  - Global Option Set / Drop Down
  - Charting for Entity
  - Web Resource
  - Customize using Java Script (Jscript)
    - Data Manipulation
    - Controlling Data Control
    - Function Library
  - Relationship
    - One to One
    - One to many

- Many to Many
  - Lab
  - Mapping between Entity
    - Lab
  - Setting up Relationship among Records (Entity)
  - Connections and Relationship Role
  - How to publish
  - Solution
    - What is Solution
    - How to add/remove element of "Solution"
    - "Solution" Deployment
    - Benefits
    - Managed Vs Un-Managed
  - Templates
    - Type of Template
    - How to Make/Edit Template
    - How to use Template
    - Advantages
    - Lab
  - Do's and Don'ts
  - Best Practices
  - Lab

Advance Configuration

- Data Audit
  - What is Data Audit
  - How to Enable/Disable Data Audit
  - How to manage Data Audit
- Data Management
  - Data Map
  - How to Import Data
  - How to manage Import Data Session
  - Data Duplicate Detection
- Duplicate Detection
  - Rule
  - Job
- Auto Numbering System
- System Settings
- User Settings
- Business Management : How to Manage
  - Fiscal Year
  - Business Closure
  - Facilities/Equipment
  - Sales Territories
  - Sites
  - Relationship Roles
  - Lab/Hands on
- Knowledge Management in CRM
  - Subject
  - Articles
  - Life Cycle
  - How to Search
  - Benefits
  - Lab
- Exploring Database
  - Table Structure

- o View Structure
- o Filtered View

Analytics / Report

- Reporting
  - o Creating Report
    - Using CRM Editor
    - Using SSRS
  - o Exploring SSRS using BIDS
    - Type of Reports(Only for SSRS)
      - Tabular
      - Matrix
  - o Publishing
  - o Security Settings
  - o Integrate SSRS Report in CRM
  - o Lab

Extending CRM - (Only for Developer and Architect)

- Extending CRM
  - o Limitation of Customization
  - o Enhance CRM using CRM Extending Features
    - Benefits
    - Limitation
    - Scenario
  - o Why we need to extending feature
  - o Event Programming
    - What is event Programming
    - Background Process
    - How CRM manage Background Process
    - Exploring CRM Database
    - Org. Database
    - Config database
    - Other Database
  - o Extensions
  - o Process
    - Type
      - Dialogue and Business Process Flow
      - Workflow
        - o Async Workflow
        - o Realtime Workflow
      - Action
    - Overview
    - Process thru CRM Editor
    - Process life cycle
    - Monitoring of Process
    - Status checking
    - Scenario to use Dialogue and Workflow

  - o Solution
    - How to make Solution
    - How to apply Solution
    - Managing Solution & Best Practice

- Advancement with Jscript

  - OData
  - Use of JSON/JQuery
  - Integrate HTML/Silverlight Page

- Command Bar / Ribbon

  - How to add/ Remove Command bar /Ribbon Button

- SiteMap

  - How to edit sitemap and add new item URL

- SDK (Hands On)

  - What is SDK
  - How it will be used in programming
  - Concept of Plug-ins
  - How to develop Plug-ins
  - Custom workflow