

Customization and Configuration in Microsoft Dynamics CRM 2011

Course Number 80294; Three Days – Instructor led

Introduction

This training describes the techniques required to customize Microsoft Dynamics CRM to meet the specialized needs of businesses. The topics covered include Security; creation and configuration of entities; design of forms views and charts; auditing and Solutions. The training describes each topic and how each topic relates to the other topics to produce a full configured, effective solution.

Audience

This training 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.

At Training Material Completion

After reviewing this training, individuals will be able to:

- ✓ Design and implement strategies for the creation of Business Units and Security Roles
- ✓ Create and configure Microsoft Dynamics CRM Users and Teams
- ✓ Describe the principles of customizing the system
- ✓ Create and configure fields for both custom and system entities
- ✓ Create and configure custom entities, including standard and activity entities
- ✓ Design, create and configure relationships between entities
- ✓ Create and configure Views, Charts and Forms for both system and custom entities
- ✓ Implement Field Security in Microsoft Dynamics CRM
- ✓ Configure and monitor auditing on Microsoft Dynamics CRM components
- ✓ Design, create and configure Solutions in Microsoft Dynamics CRM; implementing both managed and unmanaged Solutions

Prerequisites

Before reviewing this training, individuals must have:

- ✓ A working knowledge of how to use Microsoft Dynamics CRM 2011.