80729AE: Customization and Configuration In Microsoft Dynamics CRM 2016

Course Outline

1. Introduction to Customizing and Configuring Dynamics CRM
    a. CRM Overview
    b. What is Dynamics Customization and Configuration?
    c. CRM Architecture
    d. Customization Methodology
2. Manage Microsoft Dynamics CRM Online Subscriptions
. Module Overview
    a. Configuring CRM
    b. Overview of CRM Security
    c. User Administration
    d. Mailboxes
    e. Teams
    f. Module Review
3. Configuring Dynamic CRM
. Configuring CRM
    a. Overview of CRM Security
    b. User Administration
    c. Mailboxes
    d. Teams
4. CRM Security Model
. Purpose of the CRM Security Model
    a. Privileges
    b. Access Levels
    c. Security Roles
    d. Hierarchy Security
    e. Hierarchy Types
5. Introduction to Solutions
. Solutions Overview

    a. Solution Details
    b. Creating and Working with Solutions
    c. Working with Solution Assets
    d. Exporting Solutions
    e. Importing Solutions
6. Entity and Field Customization
. Types Entities
    a. Entity Ownership
    b. Entity Properties
    c. Managed Properties
    d. System vs Custom Entities
    e. Custom Entities and Security Roles
    f. Overview of Fields
    g. Field Properties
7. Additional Field Customizations
. Creating Fields to Meet Client Needs
    a. Calculated Fields
    b. Rollup Fields
    c. CRM Options Sets
    d. Alternate Keys
    e. Field Level Security
    f. State and Status Reason Transitions
8. Configure mobile devices
. Module Overview
    a. Types of Relationships
    b. How and where they are created
    c. Many to Many Relationships
    d. Hierarchical Data
    e. Entity Mapping
    f. Connection and Connection Roles
    g. PRACTICE
        1. Configure entities for mobile apps. 123
        2. Scenario
        3. Connect to the CRM Online instance

4. Navigate to the default solution
5. Hide the fax field in CRM for Phones
6. Add the city field to CRM for Phones Express
7. Make the account entity read-only
8. Publish changes

9. Customizing Forms

. Form Types
  a. Qualities of a good form
  b. Building a Form
  c. Specialized Form Components
  d. Access Teams and Sub Grids
  e. Working with Navigation
  f. Additional Form Types
  g. Multiple Forms
  h. Form Customizations and Mobile Clients
  i. PRACTICE
     1. Set default synchronization method
     2. Scenario
     3. Connect to the CRM Online instance
     4. Navigate to the Email tab on System Settings
     5. Change the default synchronization methods
     6. Apply the defaults to existing mailboxes
     7. Review approval settings
     8. Scenario
     9. Connect to the CRM Online instance
     10. Navigate to the default solution
     11. Review the approval settings

10. Business Rules

. Business Rules
  a. Business Rule Scope
  b. Triggering Rules
  c. Conditions and Actions
  d. Else Conditions and Actions Occur when conditions are True
  e. PRACTICE

1. Configure forward mailbox record
2. Scenario
3. Connect to the CRM Online instance
4. Navigate to mailboxes
5. Create the forward mailbox record
6. Review alerts
7. Scenario
8. Connect to the CRM Online instance
9. Navigate to a mailbox record and review alerts
10. Reject the email address
11. Approve the email address
12. Review alerts in the Sales area

11. View and Visualizations

. Using Views

  a. View Customization
  b. System View Types Quick Find
  c. Customizing Charts
  d. Customizing Dashboards
  e. Themes

12. Introductions to Processes

. Processes and Automation

  a. Workflow Basics
  b. Conditions and Actions

13. Business Process Flows

. What are CRM Business Process Flows

  a. Enabling Business Process Flows
  b. Steps Stages and Categories
  c. Conditional Branching

14. Bringing it all Together

. Review of Customization Topics Covered

  a. Scenario
  b. Packaging in a Solution