

# 80542: Customization and Configuration in Microsoft Dynamics CRM 2013

## Course Outline

1. Module 1: Introduction to Customizing Microsoft Dynamics CRM 2013
  - a. Customization or Development?
  - b. Microsoft Dynamics CRM Solutions
  - c. Introduction to Entity Customization
  - d. Lab : Create a Solution and publisher
2. Module 2: Building a Security Model in Microsoft Dynamics CRM 2013
  - . Introduction to Business Units
    - a. Overview of Security Roles
    - b. User Management Overview
    - c. Team Management Overview Teams and Sharing
    - d. Manage Security Roles for Users and Teams
    - e. Lab : Configure Security Roles
    - f. Lab : Configure User Access
3. Module 3: Customizing Entities
  - . Entity Customization Concepts
    - a. Create a Custom Entity
    - b. Additional Entity Properties
    - c. Modifying the Configuration of an Entity
    - d. Lab : Create Custom Entities
    - e. Lab : Create a Custom Activity Entity
4. Module 4: Customizing Fields
  - . Field Data Types
    - a. Field Display Formats
    - b. Field Properties
    - c. Customize Existing Fields
    - d. Configure Option Sets
    - e. Status and Status Reason Fields
    - f. Delete Fields

- g. Lab : Create and Modify a Global Option Set
5. Module 5: Managing Relationships
    - . Types of Entity Relationships
      - a. Create Entity Relationships
      - b. 1:N Relationship Behavior
      - c. Field Mappings in 1:N Relationships
      - d. Connections and Connection Roles
      - e. Lab : Create New Relationships
      - f. Lab : Customize Relationship Mappings
  6. Module 6: Customizing Forms
    - . Form Customization Overview
      - a. Create and Modify Forms
      - b. Quick Create and Quick View Forms
      - c. Manage Multiple Forms
      - d. Mobile Clients
      - e. Lab : Modify Form Layout and Add Fields
      - f. Lab : Create a Role-Based Form for the Competitor entity.
  7. Module 7: Configuring Business Rules
    - . Configure Business Rules
      - a. Lab : Create a Business Rule
  8. Module 8: Customizing Views
    - . View Customization Concepts
      - a. System Views
      - b. Create Custom Views
      - c. Remove Unwanted Views
      - d. Lab : Modify a Quick Find View
      - e. Lab : Create Custom Views
  9. Module 9: Customizing Charts and Dashboards
    - . Create and Modify Charts
      - a. Export and Import Charts
      - b. Create and Modify Dashboards
      - c. Lab : Create a Custom Chart
      - d. Lab : Create a Dashboard
  10. Module 10: Additional Security Options

- . Field Security

- a. Access Team Templates

- b. Auditing Overview

- c. Lab : Configure Field Security

- d. Lab : Create and Configure an Access Team Template

11. Module 11: Business Process Flows

- . Business Process Flows

- a. Lab : Create a Multi-Entity Business Process Flow

- 1.