

3 Days

55168A: Customization and Configuration in Microsoft Dynamics CRM 2015

Customization and Configuration in Microsoft Dynamics CRM 2015 is a 3-day Instructor Led Training courses. It is intended for the IT Professionals and IT Developers who engages in or who wants to Customise and Configure Microsoft Dynamics CRM 2015 Applications.

This instructor-led course covers structuring of Walkthroughs in each module. There are labs included at the end of each module to give you the practical knowledge of the modules you're dealing in.

Objectives:

You should be able to meet the following objectives after the completion of the course:

- Implement Field Security and Access Team Templates in Microsoft Dynamics CRM
- Design, create and configure Solutions in Microsoft Dynamics CRM
- Describe the principles of customizing the system
- Create and configure fields for both custom and system entities
- Configure Microsoft Dynamics CRM Users and Teams

Course Details

Course Outline

Module 1: Introduction to Customizing Microsoft Dynamics CRM 2015

Lab: Create a Solution and publisher

Module 2: Building a Security Model in Microsoft Dynamics CRM 2015

Lab: Configure Security Roles

Lab: Configure User Access

Module 3: Customizing Entities

Lab: Create Custom Entities

Lab: Create a Custom Activity Entity

Module 4: Customizing Fields

Lab: Create and Modify a Global Option Set

Module 5: Managing Relationships

Lab: Create New Relationships

Lab: Customize Relationship Mappings

Module 6: Customizing Forms

Lab: Modify Form Layout and Add Fields

Lab: Create a Role-Based Form for the Competitor entity

Module 7: Configuring Business Rules

Lab: Create a Business Rule

Module 8: Customizing Views

Lab: Modify a Quick Find View

Lab: Create Custom Views

Module 9: Customizing Charts and Dashboards

Lab: Create a Custom Chart

Lab: Create a Dashboard

Module 10: Additional Security Options

Lab: Configure Field Security

Lab: Create and Configure an Access Team Template

Module 11: Business Process Flows

Lab: Create a Multi-Entity Business Process Flow

Who Should Attend

The person with:

- Working knowledge of how to use Microsoft Dynamics CRM 2015
- Basic understanding of Microsoft SQL Server
- Relational database functionality and understanding of Microsoft Dynamics CRM 2015 applications
- The ability to customize and configure Microsoft Dynamics CRM 2015 Applications
- Who intends to customize and configure Microsoft Dynamics CRM 2015 Applications

Pre Requisite

The students should know the following, before attending this course:

- Basic understanding of Microsoft SQL Server and relational database functionality.
- Working knowledge of how to use Microsoft Dynamics CRM 2015.

- Completed Microsoft Dynamics CRM 2015 applications training.

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