

3 Days

80542A: Customization and Configuration in Microsoft Dynamics CRM 2013

Customization and Configuration in Microsoft Dynamics® CRM 2013 is a training program that will guide you about the techniques which are required for customization of Microsoft Dynamics CRM for meeting the specialized needs of the business. These topics cover security, creation, and configuration of entities, designing of forms views and charts, auditing and solutions.

Objectives:

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

- Configuring Microsoft Dynamics CRM Users and Teams
- Creating and configuring Views, Charts, and Forms for both system and custom entities
- Field Security and Access Team Templates Implementation in Microsoft Dynamics CRM
- Describing the principles of customizing the system
- Designing and implementing strategies for the creation of Business Units and Security Roles
- Designing, creating and configuring Solutions in Microsoft Dynamics CRM

Course Details

Course Outline

Module 1: Introduction to Customizing Microsoft Dynamics CRM 2013

Module 2: Building a Security Model in Microsoft Dynamics CRM 2013

Module 3: Customizing Entities

Module 4: Customizing Fields

Module 5: Managing Relationships

Module 6: Customizing Forms

Module 7: Configuring Business Rules

Module 8: Customizing Views

Module 9: Customizing Charts and Dashboards

Module 10: Additional Security Options

Who Should Attend

- Novice customizers of Microsoft Dynamics CRM
- Experienced customizers of Microsoft Dynamics CRM

Pre Requisite

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

- Working knowledge of Microsoft Dynamics CRM 2011
- Knowledge of Microsoft Dynamics CRM 2011 or 2013 applications
- Basic understanding of Microsoft SQL Server
- Basic understanding relational database functionality

Exams

Microsoft Certified Professional (MCP) [MB2-703]

464, Udyog Vihar Phase
V, Gurgaon (Delhi
NCR)-122016, India

+91 8882 233 777

training@mercury.co.in

www.mercurysolutions.co

Date - Jun 13, 2025