

1 Days

What's New in Microsoft Dynamics CRM 2011

This one-day instructor-led course, What's New in Microsoft Dynamics CRM 2011, provides aspirants with the tools and information to help them better understand and identify the new and enhanced features of Microsoft Dynamics CRM 2011.

Course Details

Course Outline

Module 1: Introduction This module provides a general overview of the features and benefits of using Microsoft Dynamics CRM 2011. Lessons User Productivity - Features and Benefits Collaboration - Features and Benefits Analysis and Visualizations - Features and Benefits Connections, Recurring Activities, and Goal Management - Features and Benefits Customization and Extensibility - Features and Benefits Administration and Configuration - Features and Benefits After completing this module, students will be able to: Identify the features and benefits of using Microsoft Dynamics CRM 2011

Module 2: Improvements to the Microsoft Dynamics CRM Application

Modules and Productivity This module focuses on the specific improvements to the application modules, in addition to enhancements to user productivity. This module will focus on a number of topics such as navigation changes, visualizations and analytics, personalization of the application, Microsoft Dynamics CRM Client for Microsoft Outlook changes, data import, team ownership, goal management, and many other features and enhancements. Lessons Productivity Features Visualizations Personalization and Dashboards Microsoft Dynamics CRM Client for Microsoft Outlook Connections Data Import Team Ownership Goal Management Dynamics Marketing Lists Recurring Activities Lab : Creating a Personal Dashboard and Visualizations Create a personal dashboard Lab : Setting Goals Create a new goal for a CRM user Create rollup queries Define goal metrics Lab : Importing Data Map data from a Microsoft Excel Spreadsheet Create data map Automatically create a custom entity and attributes tied to the imported data After completing this module, students will be able to: Explore and identify new features of Microsoft Dynamics CRM 2011 that impact user productivity. Demonstrate and use improvements to the sales, marketing, and service modules.

Module 3: Customizing and Extending Microsoft Dynamics CRM 2011 This module covers the improvements made to the basic entity customization functionality, in addition to enhancements to additional extensibility components such as workflows, dialogs, web resources, solution management, and integration with Microsoft Office SharePoint Server. Lessons Overview of Customization Environment Entity and Form Customizations Chart and View Customizations Microsoft Office SharePoint server Configuration Custom Activities Dashboards Web Resources Connection Roles Processes: Workflows and Dialogs Customization Management Integrations: Microsoft Office SharePoint Server and Windows Azure Platform Lab : Custom Entity Creation Create a custom entity Create custom attributes Modify a form Lab : Custom Activity Creation and Use Create a custom activity entity Lab : Creating a Dialog Process Create a custom dialog process Lab : Including SharePoint Document Libraries into Microsoft Dynamics CRM forms Install the Microsoft Dynamics CRM List component Configure the integration with Microsoft Office SharePoint Server After completing this module, students will be able to: Explain changes to basic customization capabilities Demonstrate the use of custom activities Explain the use of Workflows and Dialogs Identify various integration functionality Create and manage a customization environment

Module 4: Administration, Configuration, and Installation This module focuses on the hardware and software requirements for Microsoft Dynamics CRM 2011, improvements to the installation process, and an overview of upgrade considerations. This module will cover changes to the Deployment Manager, in addition to licensing and auditing functionality new to this version. Lessons Editions of Microsoft Dynamics CRM 2011 Hardware and Software Specifications Server Roles Installation Components Upgrade Considerations Microsoft Dynamics CRM Reporting Extensions Deployment Manager Organization Settings Licensing Auditing After completing this module, students will be able to: Explain the different editions of Microsoft Dynamics CRM 2011 Outline the hardware and software specifications Identify upgrade considerations Demonstrate the use of the auditing functionality

Module 5: Configuration and Settings This module introduces the changes to the Microsoft Dynamics CRM 2011 server settings, and additional personal options that are new to this version. Additionally, this module introduces role based forms and field level security. Lessons Business Units User Management Data Management Document Management Audit Management Microsoft Dynamics CRM Client for Microsoft Outlook Settings and Administration Role Based Forms Field-Level Security Lab : Working with Field-Level Security Create a new attribute that is enabled to use field level security Create a field level security profile After completing this module, students will be able to: Outline the changes to system and personal settings Demonstrate the use of role-based forms Configure and deploy field-level security

Who Should Attend

This course is intended for customers and partners, who want to learn the basic new features and functionality in Microsoft Dynamics CRM 2011. Training is recommended for anyone who plans to use, implement, maintain, customize, or support Microsoft Dynamics 2011. This course is also recommended for people who have a background in the use of previous versions of Microsoft Dynamics CRM.

Pre Requisite

Before attending this course, students must have: General knowledge of Microsoft Dynamics CRM 4.0.

Exams

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Date - Jun 13, 2025