

8912 - Customization and Configuration in Microsoft Dynamics CRM 4.0

IN BRIEF

Delivery: Instructor-led course

Duration: Three days

Class size: 10 Students Max.

Cost: \$2,300 per person + GST

Inclusions: Microsoft expert instructor, comprehensive course manual, individual computer access, and fully catered lunch, morning and afternoon tea breaks.

Prerequisites: Participants in this course must have a working knowledge of how to use Microsoft Dynamics CRM 4.0. It is recommended, but not required, that students have completed Microsoft Dynamics CRM 4.0 Applications training. Because this course focuses on customizing database entities, attributes, relationships, and mappings, it is recommended that students have a basic understanding of Microsoft SQL Server and relational database functionality.

Products Covered: Microsoft CRM 4.0

Previous Training: 8913 – Applications in Microsoft Dynamics CRM 4.0

Course Description

This three-day course teaches students how to configure Microsoft Dynamics CRM organizational settings, organizational structure, users, teams, security, multilingual user interface, and currency exchange rates to meet your business requirements. Students are also shown how to use the application's built-in customization tools to customize Microsoft Dynamics CRM user interface components and databases components such as forms, views, entities, attributes, relationships, and mappings.

Audience

This course is intended for Microsoft Dynamics CRM Implementation Consultants and System Administrators and Customizers who will configure the application's organizational settings and customize the application using its built-in customization tools. The course is not intended for developers who customize the application using Web development, JavaScript (JScript), DHTML, and the Microsoft Dynamics CRM SDK.

Topics Covered

Creating Your Organizational Structure

- Business Units
- Managing Business Units

Configuring Security

- Microsoft Dynamics CRM Security Features
- Privileges
- Access Levels
- Security Roles
- Security Roles and Business Units
- Creating and Copying Security Roles
- Planning Considerations when Configuring Security

Configuring Users and Teams

- User Management Overview
- Adding and Maintaining User Accounts
- Team Management

Configuring Organizational Settings

- System Settings
- Auto Numbering
- Fiscal Year Settings
- Multilingual User Interface
- Multicurrency

Customizing Microsoft Dynamics CRM

- Customization Methodology
- Who can Customize Microsoft Dynamics CRM
- Microsoft Dynamics CRM Architecture
- Types of Customizations
- Upgrading Customizations
- Publishing Customizations
- Reusing Customizations

Customizing Forms and Views

- Basic UI Customization Capabilities
- Form Customization Overview
- Form Customization - Editing Tabs
- Form Customization - Editing Sections
- Form Customization - Editing Fields
- Preview Your Customizations
- Preview Form Customization
- View Customization

Customizing Entities and Attributes

- Customization Concepts
- Customizing Attributes
- Creating a Custom Entity



.....Topics Covered Continued

Customizing Relationships and Mappings

- Supported Entity Relationships
- Unsupported Entity Relationships
- 1:N Relationship Behaviour
- Creating Entity Relationships
- Entity Mapping

Renaming Entities and Translating Customizations

- Renaming a Customizable Entity
- Translate Customized Labels

Maintaining Organizations Through Deployment Manager

- Creating Multiple Organizations
- Deployment Manager - Deployment Administrators
- Deployment Manager - Organizations
- Deployment Manager - Servers
- Deployment Manager - License

Introduction to Advanced Customizations

- Introduction to Workflow
- Introduction to Application Event Programming
- Common Uses for Event Programming
- Using Form Events
- Using Field Events
- Configuring Event Detail Properties
- Introduction to IFrames
- Introduction to URL Addressable Forms
- Introduction to Creating Custom Menus, Navigation Items, and Buttons
- Introduction to ISV.Config Integration Points
- Introduction to SiteMap
- SiteMap Structure
- Introduction to SDK Capabilities
- ISV Solutions

