



Customisation and Configuration in Microsoft Dynamics CRM 2015

Description

This course, uses structured Walkthroughs throughout each module to put into practice what has just been introduced by the trainer. There's also a Lab at the end of each module with 'high-level' requirements as well as detailed, step-by-step instructions.

A number of the modules also incorporate a 'Stretch Yourself' lab for more advanced delegates or for those who simply work at a faster rate than other delegates.

After each module's lab(s), a set of questions are posed to test delegates' understanding of the material introduced in the module.

There is an Examination at the end of this course.

Syllabus

- Module 1: Introduction
- Module 2: Security Issues
- Module 3: Customising System and Custom Entities
- Module 4: Customising Attributes
- Module 5: Establishing Relationships
- Module 6: Form Customisation
- Module 7: Business Rules
- Module 8: View Customisation
- Module 9: Chart and Dashboard Customisation
- Module 10: Further Security Features of Crm 2015
- Module 11: Business Process Flows

Full course specification is available at <https://www.microsoft.com/en-au/learning/course.aspx?cid=55168>

Learning Outcomes

On completion of this course you will be able to

- Design and implement strategies for the creation of Business Units and Security Roles
- Configure Microsoft Dynamics CRM Users and Teams
- Describe the principles of customizing the system
- Create and configure fields for both custom and system entities
- Create and configure custom entities, including standard and activity entities
- Design, create and configure relationships between entities
- Create and configure Views, Charts and Forms for both system and custom entities
- Implement Field Security and Access Team Templates in Microsoft Dynamics CRM
- Design, create and configure Solutions in Microsoft Dynamics CRM
- Design, create and configure Business Rules and Business Process Flows to guide users through their work

Participants and Requirements

Those attending this course one must have:

- A working knowledge of how to use Microsoft Dynamics CRM 2015.
- A basic understanding of Microsoft SQL Server and relational database functionality.
- Completed Microsoft Dynamics CRM 2015 applications training.

Certificate

Microsoft Certificate

Course Duration

3 days