

Microsoft Dynamics 365 (CRM Technical)

Total Duration 70hours

Prerequisites:

C#

SQL

Oops

XRM SDK(Plugin and Workflow)

SSRS Reports Design

Java Script

Introduction to Microsoft Dynamics CRM

- Deployment types & Licensing Option
- XRM Framework

Service Module

- Case Management
- Queue Management
- Contracts
- SLA
- Entitlements
- Automatic record creation and updating rules

Working with Dash Boards

Accessing CRM from Outlook

CRM 2016 Online & On Premise Deployment

Adding Users

- Adding various Services

- License comparisons
- Office 365 Dashboard
- Deployment Manager

Administration & Security

- Creating and managing Business Units, Users and Teams
- Privileges, Access Levels and Security Roles
- Positions & Hierarchies
- Creating and managing Security Roles
- Auto Numbering, Languages
- System Settings
- Auditing
- Themes

Settings & Configuration

- Data Management
- Duplication Detection Settings, Rules and Jobs
- Bulk Record Deletion
- Data Maps and Imports
- Product Catalog
- Understanding the Product Catalog
- Unit Groups
- Adding Products
- Creating Price Lists
- Creating Discount Lists

MS CRM Entity Model

- Customization Concepts – Entity Types and Attributes
- Creating Custom Entities and Attributes

- Workflows
- Plugins

Entity Customization

- Form Customizations
- UI Customization Capabilities
- Form Customization – Working with Tabs, Sections, Fields and Iframes
- Introduction to Application Event Programming
- Using Form and Field Events
- Mobile Forms

Relationships

- Types of Relationships
- Relationship Behaviors
- Creating Entity Relationships
- Entity Mapping

Views and Advanced Views

- Public, Personal and System Views
- View Customizations – Common Tasks
- Advanced Views Customizations

Form Scripting

- Client side scripting using Java Script

Working with Web Resources

Business Process Flows

Business Rules

Mobile CRM

Processes (Workflows & Dialogs)

Overview of Workflow

- **Creating Workflows steps through Workflow Designer**
- **Overview of Dialog**
- **Creating Dialog Pages, Prompt and Response**

Introduction to Solutions

Managed & Unmanaged Solutions

- **Importing & Exporting Solutions**
- **Clone a patch**
- **Clone Solution**
- **Upgrade Solution**

SDK & Developer Resources

Plugins

- **The Event Execution Pipeline**
- **Developing Plugins**
- **Plugin Registration Tool**
- **Deploying Plugins**

Microsoft CRM – Outlook Integration

- **Settings**
- **Email Configuration**
- **Email Tracking in CRM**

Microsoft CRM – SharePoint Integration

- **Settings**

- **List Component**
- **Server-Side Sync**
- **Document uploading from CRM to SharePoint**
- **SharePoint overview**

Tools

- **Ribbon work Bench tool**
- **XRM Tool Box/Site Map Editor**

Server Troubleshooting Tips

- **Event Viewer**
- **MSCRM services**
- **IIS Manager**
- **Recommended settings in server**