

80729 - Customization and Configuration in Microsoft Dynamics CRM 2016 MB2-712 (4 Days)

Description

This learning course provides students with the tools to customize and configure a Dynamic CRM implementation. The focus is on the using and understanding how the platform tools that are provided can be leveraged to create custom objects, modify the user interface, automate tasks, and other specific customizations.

Prerequisites-

1-3 years Dynamics CRM experience as End-user or Admin. Working Knowledge of Active Directory and CRM Security Model. Working knowledge and understanding of Microsoft SQL Server. Basic knowledge of Dynamics CRM Architecture.

This course helps prepare you for exam MB2-712.

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Module 01: Introduction to Customization and Configuring Dynamics CRM

Talent and Course Introduction

Module Overview

- CRM Overview
- What is Dynamics Customization and Configuration?
- CRM Architecture
- Customization Methodology

Module review

Obtaining a Dynamics CRM Trial

Module 02: Manage Microsoft Dynamics CRM Online Subscriptions

Module Overview

- Configuring CRM
- Overview of CRM Security
- User Administration
- Mailboxes
- Teams

Module Review

MODULE 2 PRACTICE

Module 2: Configuring Dynamics CRM

Practice 2.1: Configure Business Units, Users, and Teams

Module 03: CRM Security Model

Module Overview

- Purpose of the CCRM Security Model
- Privileges
- Access Levels
- Security Roles
- Hierarchy Security
- Hierarchy Types

Module review

MODULE 3 PRACTICES

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Module 04: Introduction to solutions

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Module review

Module 05: Entity and Field Customization

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- Entity Properties
- System vs Custom Entities
- Custom Entities and Security Roles
- Overview of Fields
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Module review

Module 06: Additional Field Customization

Module Overview

- Creating Fields to Meet Client Needs
- Calculated Fields
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- Field Level Security
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Module Review

Module 07: Configure mobile devices

Module Overview

- Types of Relationships
- How and where they are created
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Module Review

MODULE 7 PRACTICE

- Configure entities for mobile apps
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- Navigate to the default solution
- Hide the fax field in CRM for Phones
- Add the city field to CRM for Phones Express
- Make the account entity read-only
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Module 08: Customizing Forms

Module Overview

- Form types
- Qualities of a good form
- Building a Form
- Specialized Form Components
- Access Teams and Sub Grids
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Module Review

MODULE 8 PRACTICE

- Set default synchronization method
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Module review

MODULE 9 PRACTICE

- Configure forward mailbox record
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Module 10: Views and Visualizations

Module Overview

- Using Views
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- Customizing Dashboard
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Module Review

Module 11: Introduction to Processes

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Module review

Module 12: Business Process Flows

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Module Review

Module 13: Bringing it all Together

Module Overview

- Review of Customization Topics Covered
- Senario
- Packaging in a Solution
- Module review

Course Review

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