

80666 : Extending Microsoft Dynamics CRM Online and On Premise (2 Days)

Description

This course provides individuals with the knowledge and skills to develop extensions for Microsoft Dynamics CRM. The course focuses on extension methods documented in the Microsoft Dynamics CRM SDK

Contents

Extending Dynamics CRM Online

- Talent Introduction and Course Overview
- Course Objectives:

Module 01: Overview of Extending Dynamics CRM 2015

- Overview:
- Configuration, Customize, and Extend
- Built-in Functionality
- Types of Extensibility
- Navigation and Commanding
- APIs - Working with Data, Services, and Forms
- Multi-Tenant Deployment
- Solutions Overview
- Introducing the CRM SDK
- Developer Tools Overview
- Development Environments
- Module Review

Module 02: Customizing navigation and the command bar

- Module Overview
- Overview of CRM Navigation and Commanding
- Navigation Across the Different User Experiences
- Site Map Structure
- Steps to Modify Navigation
- Command Bar Customization
- URL Addressable Forms & Views (20)
- Command Definition Components
- Using Parameters
- Types of Display and Enable Rules
- Languages
- Command Bar Editing Consideration
- Learning more from the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 03: Form event scripting

- Module Overview
- Overview of Form Scripting
- Form Scripting Scenarios
- Form and Field Events
- Steps to implement a script in CRM
- Walkthrough using Dev Tools
- Xrm.Page API Overview
- Working with Data
- Attributes vs. Controls
- Working with Controls
- Utility Function Overview
- Learning more in the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 04: Extending the UI with web resources

- Module Overview
- Types of Web Resources
- Where Web Resource can be used/ Scenarios
- Steps to create a web resource
- Placing and Web Resources on Forms
- Using the Data and other Parameters
- Controlling Web Resources
- Referencing web resources
- Learning more from the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 05: Using the CRM organization service

- Module Overview
- Scenarios for using the organization service
- Understanding Organization Request/Response
- CRM Data Types
- Options for Getting IOrganizationService Instance
- CRM SDK Assemblies
- Demonstration: Create Records using Late Binding
- Early and Late Binding
- CRMSvc Utility
- CRM Data Types
- Demonstration: Update & Delete Records using Late Binding
- Basic Operations
- Other Methods
- Demonstration: Update & Delete Records using Late Binding
- Handling Faults
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- Demonstration: Learn More with the SDK
- Module Review

- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 06: Query data with the organization service

- Module Overview
- Query Styles- Query by Attribute, Query Expression, Fetch, LINQ
- Using Query By Expression
- Demonstration: Query CRM Data with Query Expression
- Using Query Attribute
- Using Fetch
- Demonstration: Create a Aggregate FetchXML Query
- Using LINQ
- Learn more from the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 07: Using the REST/OData endpoint

- Module Overview
- Overview of REST/Odata
- OData Resource Path Examples
- Query Options
- Demonstration: Query CRM data using Odata
- Modifying Data
- Demonstration: Perform Record Operations with OData
- External Application Authentication with OAuth (high level)
- Review of the Web API
- Learn more from the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 08: Plug-ins

- Module Overview
- Overview of Plugin Scenarios
- Exploring Plug-in Architecture
- Demonstration: Create a CRM Plugin
- Using CRM Developer Toolkit
- Plug-in Isolation
- Tracing and Debugging Plugins
- Demonstration: Debug a CRM Plugin
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers

Module 09: Custom workflow activities

- Module Overview
- Overview of CRM Workflows
- Example Custom Activity Scenarios
- Custom Workflow Class Diagram

- Working with Parameters
- Working with Services using Developer Toolkit
- Demonstration: Create a Custom Workflow Activity
- Learn more from the SDK
- Module Review
- Test Your Knowledge Questions
- Test Your Knowledge Answers
- Course Review

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