

## Training Syllabus of Microsoft Dynamics CRM

### ➤ Overview of the CRM Application, Platform and Security Module

- Introduction to CRM
- CRM Architecture
- Overview of Sales
- Marketing, Service Modules
- User Authentication
- Multi-tenant
- Administrative Settings
- Business management
- Data management
- Document Management
- Configuration management
- Security model
- Programmability and Solutions.

### ➤ Data Modeling in Actions

- Overview of Sales Process
- Marketing Process
- User Authentication
- APIs, Solutions
- Data Modelling examples etc.

### ➤ CRM Customizations

- Form
  - Introduction to form and customizations
  - Lookups
  - Subgrids
  - Webresource etc.
- Security Role
  - Introduction to Security Roles
  - Role tailored forms and Role assignments.
- View
  - Managing view and its customizations
- Relationships
  - Types of Relationships
  - Relationship Behaviors
  - Creating Entity Relationships
  - Entity Mapping

- Navigation
  - Editing of navigation pane
  - Sitemap
  - Introduction of different sections in ribbons and its customizations.
- Client Scripting
  - Form Scripting using various methods of XRM assembly.
- Business Rules
  - Create Business rules
  - Calculated fields
  - Roll up fields
- HTML Webresource
  - Create and include HTML Webresource in Form
  - Add javascript in HTML content
  - Debug javascript from IFRAME
- Business Process Flows
  - Introduction to BPF
  - BPF Options
  - Customization using API.
- Workflows
  - Creating workflow with different steps
  - Real-time workflow
- Dialogs
  - Design dialog with different pages and steps.
- Custom Workflow Activities
  - Creating an Activity using services
  - Registering the activity
  - Debugging.
- Plugins
  - Introduction to CRM Plugins
  - Creation
  - Execution and Deployment
  - Plugin Debugging
  - Use of CRM Toolkit.
- **Data Import/Export in/from CRM environment**
  - Export data from CRM
  - Export query data from CRM
  - Download import template
  - Import data in CRM

## ➤ CRM Data and Services

- Performing Basic Data Operations
  - Create
  - Update
  - Retrieve
  - Delete
  - Assign
  - Set status
  - Handle Faults
- Common Data and Service Operations
  - Use of CRM Services and its methods
- Using LINQ, Query Expression, FetchXML with CRM Data
  - Introduction on LINQ
  - Query Expression
  - Fetch XML.
- Advanced Querying of CRM Data
  - Paging
- Using Rest endpoints
  - Introduction to REST, SOAP and OData
- Working with Metadata
  - Generating Metadata file
  - Building query using metadata
  - Filtering metadata and other uses.

## ➤ Reporting in MSCRM

- Reporting service configuration
  - Introduction to Report Server and configuration
- Basic Report configuration
  - Creation of report in CRM
- Building Report Queries
  - Creation of advanced report in CRM using FetchXML and Stored Procedure
- Report Formatting
  - Designing of report
- Managing and Deployment of Reports
  - Deployment of Report.

## ➤ Outlook in MSCRM

- Outlook client configuration with CRM org

- Installations and configuration of Outlook Client
- Customizations in Outlook
  - Overview of forms and other modules
- **Email Router in MSCRM**
  - Email Router configuration with exchange
    - Installation and configuration of Email Router
  - Email router customization with CRM
    - Configuration of User account with Email router.

## Tools

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

## Server Troubleshooting Tips

- Event Viewer
- MSCRM services
- IIS Manager
- Recommended settings in server
- IFD Introduction