



**Emporis Academy Private Limited**



Learning Solutions

## Course Syllabus

### Microsoft Dynamics CRM 4.0 Customization and Configuration (Elements of this syllabus are subject to change.)

#### **Key Data:**

**Course number: 8912A**

**Instructor-Led Training** (lecture and labs)

**Student Materials:** Microsoft Official Curriculum (MOC)

This course provides you with the knowledge and skills to customize and configure the components available in Microsoft Dynamics CRM 4.0.

#### **Chapter 1: Creating Your Organizational Structure**

This module explains how to create and structure organization units. Additionally, this module also explains how manage the business units.

Lessons
<ul style="list-style-type: none"><li>• Introduction</li><li>• Business Units</li><li>• Managing Business Units</li></ul>

#### **Chapter 2: Employee Administration**

This module explains how to set up and work with security features and privileges, it further elaborates on access levels, security role, and how to copy and use the same security roles in the business units.

Lessons
<ul style="list-style-type: none"><li>• MSCRM Security Features</li><li>• Privileges</li><li>• Access Levels</li><li>• Security Roles</li><li>• Security Roles and Business Units</li><li>• Creating and Copying Security Roles</li></ul>

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## Course Syllabus: Microsoft Dynamics CRM 4.0 Customization and configuration

- Demonstration - Creating and Copying Security Roles
- Planning Considerations when Configuring Security

### Chapter 3: Configuring Users and Teams

This module explains how to create user add the user in CRM, and adding him in the particular team.

#### Lessons

- User Management Overview
- Adding and Maintaining User Accounts
- Team Management

### Chapter 4: Configuring Organizational Settings

This module explains ways in which a company can have number series, currencies and fiscal year.

#### Lessons

- System Settings
- Auto Numbering
- Fiscal Year Settings
- Multicurrency

### Chapter 5: Customizing Microsoft Dynamics CRM Overview

This module explains how a customizations can be made, what is the basic CRM architecture, how to publish, upgrade and reuse the customization.

#### Lessons

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- Customization Methodology
- Who can Customize Microsoft Dynamics CRM?
- Microsoft Dynamics CRM Architecture
- Types of Customizations
- Upgrading Customizations
- Publishing Customizations
- Reusing Customizations

## **Chapter 6: Customizing Forms and Views**

This module explains how a form can be customized and how it can be edited, and it also helps us to find the preview and demonstration of the form.

### **Lessons**

- Basic UI Customization Capabilities
- Form Customization Overview
- Form Customization - Editing Tabs
- Form Customization - Editing Sections
- Form Customization - Editing Fields
- Preview Your Customizations
- Preview Form Customization
- Demonstration - Form Customization

## **Chapter 7: Customizing Entities and Attributes**

This module explains how a customization concepts helps us to do the transaction and how the customization attributes helps us to work with the CRM customization.

### **Lessons**

- Customization Concepts
- Customizing Attributes
- Demonstration - Creating a Custom Attribute

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## **Chapter 8: Customizing Relationships and Mappings**

This module provides a information on how the entity are related with other entity what type of relation can be used between entities and also how to creating and modifying those entities.

<b>Lessons</b>
<ul style="list-style-type: none"><li>• Supported Entity Relationships</li><li>• Unsupported Entity Relationships</li><li>• 1:N Relationship Behavior</li><li>• Creating Entity Relationships</li><li>• Demonstration - Creating an Entity Relationship</li></ul>



## **Chapter 9: Renaming Entities and Translating Customizations**

This module explains rename a customizable entity and translate the customized label

<b>Lessons</b>
<ul style="list-style-type: none"><li>• Renaming a Customizable Entity</li><li>• Translate Customized Labels</li></ul>



## **Chapter 10: Maintaining Organizations Through Deployment Manager**

This module explains how to deploy administrators, organizations, servers and licenses.

<b>Lessons</b>
<ul style="list-style-type: none"><li>• Creating Multiple Organizations</li><li>• Deployment Manager - Deployment Administrators</li><li>• Deployment Manager – Organizations</li><li>• Deployment Manager – Servers</li><li>• Deployment Manager - License</li></ul>



## **Chapter 11: Introduction to Advanced Customizations**

This module explains how to set up and work with a workflow, and also it provides a introduction to application event programming and provides examples on client-side coding. I frame and on ISV solutions.

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**Lessons**

- Introduction to Workflow
- Demonstration - Activity Creation in a Workflow
- Introduction to Application Event Programming
- Common Uses for Event Programming
- Demonstration - Examples of Client-Side Code
- Using Form Events
- Using Field Events
- Demonstration - Referencing Form and Field Values
- Configuring Event Detail Properties
- Demonstration - Creating Simple Event Scripts
- Introduction to IFrames
- Demonstration - Add an IFrame
- Demonstration - Creating a Dynamic IFrame
- Introduction to URL Addressable Forms
- Demonstration - URL Addressable Forms
- Introduction to Creating Custom Menus, Navigation Items, and Buttons Demonstration - Integrating Applications
- Introduction to ISV.Config Integration Points
- Demonstration - ISV.Config structure and custom button
- Introduction to SiteMap
- Demonstration - Apply Site Map Customizations
- Introduction to SDK
- ISV Solutions

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