Microsoft 8912 – Customisation and Configuration in Microsoft Dynamics CRM 4.0

Vendor Course Code: MS8912

Course Length: 3 days

Overview:

This three-day instructor-led course provides students with the tools to configure and customise Microsoft Dynamics CRM 4.0. Configuration topics include setting up business management functions such as:

- Business units
- Users
- Teams
- Security privileges and roles
- System Settings
- Multilingual User Interface Language Packs
- Currency Exchange Rates
- Multiple Organisations

The course also focuses on using the Microsoft Dynamics CRM 4.0 Customisation tools to customise the following system components:

- Forms
- Views
- Entities
- Attributes
- Relationships
- Entity Mappings

The following customisation topics are outside the scope of this course, but are introduced here to provide students with insight into potential advanced customisation features:

- Application Event Programming
- Client Extensions
- Workflow
- SiteMap
- URL Addressable Forms
- IFrames
- SDK

Skills Gained:

At Course Completion

The course completion objectives are:

- Configure a company's organisational structure within Microsoft Dynamics CRM
- Add user accounts
- Create and maintain security roles
- Create teams of users
- Create and configure multiple organisations within one implementation
- Configure system settings, currency exchange rates, and multilingual user interface language packs
- Import and export customisations
- Customise forms and views
- Customise database entities and attributes
- Customise entity relationships and mappings
- Identify areas where advanced customisation functionality can be implemented

Key Topics:

Module 1: Configuring Business Units

This module explains how to set up organisational structures by maintaining business units within an organisation.

Lessons
Business Units Overview
Maintaining Business Units

Lab 1.1: Maintaining Business Units
Add Business Units
Reorganise Business Units
Delete Business Units

The goals for completing this module are for students to:

- Identify why an organisational hierarchy is defined in Microsoft Dynamics CRM
- Identify the differences between the root business unit and all other business units
- Identify the guidelines that control maintenance of business units
- Create and maintain business units in Microsoft Dynamics CRM

Module 2: Configuring Security

This module reviews the Microsoft Dynamics CRM security model, including security roles, privileges, and access levels. This module examines how to maintain permissions within security roles, and how security permissions are inherited across business units.

Lessons
Microsoft Dynamics CRM Security Features
Privileges
Access Levels
Security Roles
Security Roles and Business Units
Creating and Copying Security Roles
Planning Considerations when Configuring Security

Lab 2.1: Copying and Creating Roles
Creating a Custom Security Role
Assigning a Role

The goal of completing this chapter is to enable students to:

- Identify how privileges, access levels, and security roles are used by Microsoft Dynamics CRM to ensure data integrity and privacy
- Distinguish between entity-based privileges and task-based privileges
- Differentiate between the five types of access levels used within the security roles
- Identify how Microsoft Dynamics CRM uses security roles
- Identify the advantages of using the default Microsoft Dynamics CRM security roles
- Identify the properties of the system's two default administrative roles
- Define the relationship between roles and business units
- Create new security roles
- Create new security roles by copying privileges and access levels from existing security roles
- Identify best practices to follow when configuring security roles

Module 3: Configuring Users and Teams

This module explains how to define the users who access Microsoft Dynamics CRM and the teams that share Microsoft Dynamics CRM data.

Lessons
User Management Overview
Adding and Maintaining User Accounts
Team Management

Lab 3.1: Managing User Accounts
Adding a Single User
Adding Multiple Users

Changing a Manager
Disabling a User Account

Lab 3.2: Managing Teams
Create Teams
Add Users to a Team
Share Data with a Team

The goals for completing this module are for students to:

- Review the characteristics of Microsoft Dynamics CRM's user management structure
- Create and maintain user accounts in Microsoft Dynamics CRM
- Identify the differences between adding a single user and adding multiple users at one time
- Identify the characteristics associated with each user licensing option
- Create and maintain teams of users in Microsoft Dynamics CRM

Module 4: Configuring Organisational Settings

This module reviews a variety of configuration settings that enable each organisation to tailor Microsoft Dynamics CRM to satisfy its business requirements. These settings control the appearance and functionality of the application; they are defined at the organisation level and apply to all business units in a given implementation.

Lessons
System Settings
Auto Numbering
Fiscal Year Settings
Multilingual User Interface (MUI)
Multi-Currency

Lab 4.1: Maintaining System Settings
Configuring System Settings
Configuring Auto Numbering

Lab 4.2: Installing MUI Language Packs
Installing French and Spanish MUI Language Packs
Enabling MUI Language Packs
Selecting a language for the Web application
Installing a Language Pack on the Microsoft Dynamics CRM for Microsoft Office Outlook
Selecting a language for the Microsoft Dynamics CRM for Office Outlook

Lab 4.3: Importing Currency Exchange Rates
Import a Currency Exchange Rate file
Manually Add a Currency and Exchange Rate
Test Default Account Currency
Test Base Currency
Change the User’s Default Currency
Test the User’s Default Currency

The goals for completing this module are for students to:

- Configure several "one-time" only organisation settings that control various system-wide functionalities
- Identify the impact of each System Setting on end-user functionality
- Identify the impact of the Auto Numbering settings on end-user functionality
- Identify the impact of the Fiscal Year Settings on Sales Quota reporting
- Identify how Multilingual User Interface packs let users personalise their UI experience by displaying Microsoft Dynamics CRM in the language of their choice
- Examine how multicurrency enables monetary transactions and attributes to be defined in multiple currencies

Module 5: Customising Microsoft Dynamics CRM Overview

This module introduces all of the application features that can be customised in Microsoft Dynamics CRM and the different ways in which customisations can be applied. This is an introductory section that lays the foundation for the hands-on training that follows.

Lessons

Customisation Methodology
Who Can Customise Microsoft Dynamics CRM?
Microsoft Dynamics CRM Architecture
Types of Customisations
Upgrading Customisations
Reusing Customisations
Publishing Customisations

Lab 5.1: Importing and Exporting Customisations
View the Contact form before importing customisations
Import Customisations
View the Contact form after customisations
Export Customisations

The goals for completing this module are for students to:

- Recognise the importance of defining and using an effective implementation methodology while developing customisations
- Recognise the types of customisations that can be made based on the default Microsoft Dynamics CRM security roles
- Identify how the Microsoft Dynamics CRM architecture influences how and where users customise Microsoft Dynamics CRM
- Recognise some of the ways that Microsoft Dynamics CRM can be customised
- Identify how Microsoft Dynamics CRM's architecture enables organisations to safely upgrade their customisations
- Identify which customisations require publishing and the various ways to publish customisations
- Discover how to re-use customisations by exporting customisations made in one deployment and importing them into another

Module 6: Customising Forms and Views

This module examines how to customise the Microsoft Dynamics CRM user interface using the application's customisation tools. This includes customisations to the forms used to enter and update data and the views that display lists of records.

Lessons
Basic UI Customisation Capabilities
Form Customisation Overview
Form Customisation – Editing Tabs
Form Customisation – Editing Sections
Form Customisation – Editing Fields
Preview Your Customisations
Preview Form Customisation
View Customisation Overview
View Customisation

Lab 6.1: Form Customisation
Create a Custom Tab
Update the Details and Administration Tabs
Update the Preview form

Lab 6.2: View Customisation
Modify an existing view
Create a new view
Change an entity's default view
Modify the Quick Find view
Modify the Advanced Find view
Save an Advanced Find query as a Personal view
Modify an entity's Associated view

The goals for completing this module are for students to:

- Introduce the basic user interface components that can be customised to meet an organisation's business requirements
- Identify the features of the form customisation tool
- Examine how to organise data on a form by organising the data in tabs
- Examine how to organise data within tabs by using sections

- Identify how to add and maintain fields on a form
- Examine how to test the appearance and behaviour of a customised form prior to saving the customisations
- Examine how to customise an entity's Preview form
- Identify the types of views that can be customised
- Identify the different ways in which a view can be customised
- Examine what properties can be customised on a view and how to perform the customisations

Module 7: Customising Entities and Attributes

This module examines how to create new entities and attributes through Microsoft Dynamics CRM's built-in customisation tools.

Lessons
Customisation Concepts
Customising Attributes
Creating a Custom Entity

Lab 7.1: Creating a Custom Attribute
Add a Custom Attribute
Add the Attribute to the Entity's form
Add the Attribute to the Preview form
Create a Custom View
Publish and Test

Lab 7.2: Creating a Custom Entity
Create a Custom Entity
Create Custom Attributes
Update Entity Form
Update Entity View
Apply Custom Icons
Update Custom Entity Permissions

The goals for completing this module are for students to:

- Review the types of entities and attributes available in system
- Create and edit attributes to meet an organisation's business needs
- Examine how to create, configure, and delete custom entities
- Configure security settings to control access to and maintenance of custom entities

Module 8: Customising Relationships and Mappings ments

This module identifies the different types of supported relationships in Microsoft Dynamics CRM, as well as the types of behaviour that control how certain actions taken on a record affect related records. This training also examines entity mapping.

Lessons
Supported Entity Relationships
Unsupported Entity Relationships
One-to-Many Relationship Behaviour
Creating Entity Relationships
Entity Mapping

Lab 8.1: Create a Manual Many-to-Many Relationship
Create an Intersect Entity
Create two Many-to-One Relationships based on the intersect entity and two related entities
Add attributes to the intersect entity
Expose Attributes on the Intersect Entity form
Edit the Associated View
Save and Publish
Test the functionality

Lab 8.2: Create a Native Many-to-Many Relationship
Update Entity Attribute
Create a custom view
Create a Custom Entity

Create Custom Attributes
Create a Many-to-Many relationship
Create a Many-to-One relationship
Update an entity form
Update an entity Preview form

Lab 8.3: Add a Mapping
Update Picklist Values
Add a custom attribute
Create an Entity Mapping
Test the mapping

Lab 8.4: Case Study
Create a Department Entity
Add Department Attributes
Create Account/Department relationship
Create Department/Contact relationship
Create Contact/Department relationship
Modify the entities
Create mappings
Secure the new entity
Test the functionality

The goals for completing this module are for students to:

- Identify the various types of supported relationships that can link system and custom entities
- Identify the types of relationships that are not supported by the system
- Discover how 1:N relationship rules control how certain actions taken on a record affect related records
- Create entity relationships and configure relationship behaviour
- Discuss how attribute mapping facilitates data entry when creating new records that are related to a parent record

Module 9: Renaming Entities and Translating Customisations

This module examines the final two elements related to customising entities: renaming a customisable entity, and in a multilingual deployment, translating customised labels into the required languages.

Lessons
Renaming a Customisable Entity
Translate Customised Labels

Lab 9.1: Renaming a Customisable Entity
Back up the Case configuration
Rename the Case Entity
Change the view names
Change the Case form labels
Change the Attribute Display names
Change the messages
Publish and Export the changes
Change the online Help

The goals for completing this module are for students to:

- Examine the steps that need to be performed to rename a customisable entity
- Discover how to translate customised labels in a multilingual deployment

Module 10: Maintaining Organisations through Deployment Manager

This module examines how Microsoft Dynamics CRM supports multiple organisations in one installation. This training also examines the tools that are available in Microsoft Dynamics CRM's Deployment Manager utility.

Lessons
Creating Multiple Organisations
Deployment Manager - Microsoft Administrators

Deployment Manager – Organisations
Deployment Manager – Servers
Deployment Manager – Licenses

Lab 10.1: Maintaining Multiple Organisations
Add a new organisation
Add business units to the new organisation

The goals for completing this module are for students to:

- Identify how the multi-tenancy feature enables users to have more than one organisation installed on a single Microsoft CRM Server
- Discover how the Deployment Manager's Deployment Administrators tool is used for viewing users with the Administrator license
- Examine how the Deployment Manager's Organisations tool is used for maintaining connectivity between the Microsoft CRM Server(s), the Reporting Server, and the Microsoft CRM database
- Identify how to use the Deployment Manager's Server tool to take Microsoft CRM Servers offline and online
- Use the Deployment Manager's License tool to maintain server and client licenses

Module 11: Introduction to Advanced Customisations

This module introduces a variety of advanced customisation features that are available with Microsoft Dynamics CRM. These topics are intended for a developer audience, but the topics are introduced to expose the participant to available advanced customisation functionality.

Lessons
Introduction to Workflow
Introduction to Application Event Programming
Common Uses for Event Programming
Using Form Events
Using Files Events
Configuring Event Detail Properties
Introduction to IFrames
Introduction to URL Addressable Forms
Introduction to Creating Custom Menus, Buttons, and Navigation Items
Introduction to ISV.config Integration Points
Introduction to SiteMap
SiteMap structures
Introduction to SDK Capabilities
ISV solutions

No Labs are included; however, instructor demonstrations are performed for each of these topics and students can perform the demonstrations along with the instructor

The goals for completing this module are for students to:

- Introduce Workflow features, including Workflow events, actions, and conditions
- Identify the form and field events that can be customised with client-side code
- Examine some of the common uses of client-side code within Microsoft Dynamics CRM
- Explore the advantages of using Form events and which form Events can include client-side code
- Explore the advantages of using Field events and which field Events can include client-side code
- Examine where the JScript code for Form and Field events is entered
- Identify the issues to be aware of when adding client-side code
- Examine how IFrames provide the ability to display the web page from another application within a Microsoft Dynamics CRM form
- Examine how to link Microsoft Dynamics CRM into other applications and reports using URL Addressable forms
- Explore how to add custom menus, side tabs, and buttons to the Microsoft Dynamics CRM application.
- Identify where to add custom buttons, menus, and side tabs in Microsoft Dynamics CRM
- Examine how to customise the Navigation Pane by modifying the SiteMap
- Identify the structure of the SiteMap to customise the correct areas per business requirements
- Introduce the Software Development Kit (SDK) that is used by developers when integrating

Microsoft Dynamics CRM with other applications

- Identify where an organisation can locate ISV solutions

Target Audience:

This course is intended for Microsoft Dynamics CRM Implementation Consultants and System Administrators and Customisers who will configure the application's organisational settings and customise the application using its built-in customisation tools. The course is not intended for developers who customise the application using Web development, JavaScript (JScript), DHTML, and the Microsoft Dynamics CRM SDK.

Prerequisites:

Participants in this course must have a working knowledge of how to use Microsoft Dynamics CRM 4.0. It is recommended, but not required, that students have completed Microsoft Dynamics CRM 4.0 Applications training. Because this course focuses on customising database entities, attributes, relationships, and mappings, it is recommended that students have a basic understanding of Microsoft SQL Server and relational database functionality.