

Microsoft CRM EU: 4.0 for Administrators

Vendor Course Code: MSCRMADMIN

Course Length: 1 day

Overview: This one-day instructor-led course provides system administrators and super users with the knowledge to manage and administer the CRM solution in-house.

Skills Gained: After completing this course, students will be able to:

- Navigate Microsoft CRM and understand the standard application terminology
- 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:

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Module 1: Introduction to Administration

- 1.1 Security roles
- 1.2 Creating users
- 1.3 Business Units
- 1.4 System Settings
- 1.5 Auto Numbering Settings
- 1.6 Announcements

Module 2: Business Management Administration

- 2.1 Facilities/Equipment
- 2.2 Resource Groups
- 2.3 Services
- 2.4 Subjects
- 2.5 Relationship Roles
- 2.6 Business Closures
- 2.7 Queues
- 2.8 Sales Territories
- 2.9 Sites
- 2.10 Currencies

Module 3: Creating Templates

- 3.1 Article Templates
- 3.2 Contract Templates
- 3.3 Email Templates
- 3.4 Mail Merge Templates

Module 4: Introduction to Customising CRM

- 4.1 Creating Attributes
- 4.2 Customising forms
- 4.3 Customising views
- 4.4 Creating entities

- 4.5 Creating relationships
- 4.6 Mapping attributes

Module 5: The Product Catalog

- 5.1 Discount Lists
- 5.2 Unit Groups
- 5.3 Price Lists
- 5.4 Products

Module 6: Introduction to Creating Workflows

- 6.1 Creating workflows
- 6.2 Publishing workflows
- 6.3 System jobs - Troubleshooting workflows

Module 7: Data Management

- 7.1 Duplicate Detection Settings
- 7.2 Duplicate detection jobs and rules
- 7.3 Data Maps
- 7.4 Data Imports

Target Audience:

Administrative users of CRM 4.0

Prerequisites:

Microsoft CRM EU: 4.0 Introduction