

Microsoft Dynamics CRM 4.0 Administration

IN BRIEF

Delivery: Instructor-led course

Duration: 2 days

Class size: 10 Students Max.

Cost: \$1,550 per person + GST

Inclusions: Expert instructor, comprehensive course manual, individual computer access, and fully catered lunch, morning and afternoon tea breaks.

Prerequisites: Before attending this course, students must have a general knowledge of Microsoft Windows and an understanding of Customer Relationship Management solution processes and practices.

It is recommended, but not required, that students have completed Microsoft Dynamics CRM application training.

Products Covered: Microsoft CRM 4.0

Previous Training: None



Course Description

This two-day course provides the necessary techniques to plan, develop, apply, and examine administrative tasks within Microsoft Dynamics CRM 4.0.

Audience

This course is intended for people who plan to install, implement, configure, or support Microsoft Dynamics CRM 4.0.

The course is intended for administrators, implementers, developers, and consultants who need to understand the technical aspects and administrative functionality of Microsoft Dynamics CRM. The course is not intended for non-technical staff.

Topics Covered

Configuring the Organizational Structure

- Define an organizational hierarchy in Microsoft Dynamics CRM
- Create and maintain business units in Microsoft Dynamics CRM

Configuring Security

- Explain the basic concepts of security privileges and access levels
- Use security roles in Microsoft Dynamics CRM
- Copy and create new roles and assign users to existing roles

Configuring Users and Teams

- Create and maintain user accounts in Microsoft Dynamics CRM
- Create user accounts in Microsoft Dynamics CRM with the Add User Wizard
- Identify the characteristics of the Microsoft Dynamics CRM user management structure
- Explain the role of the Access Mode options
- Create and maintain teams of users in Microsoft Dynamics CRM

Configuring System Settings

- Set several system settings that control various system-wide functionalities
- Identify Multi-Currency and Multilingual User Interface functionality
- Use duplicate detection and data maps

Change Management

- Identify the basic concepts of change management
- Explain planning considerations for changes in Microsoft Dynamics CRM
- Review best practices for executing and testing changes made in an implementation of Microsoft Dynamics CRM

Report Customizations

- Explain the features and options for reporting in Microsoft Dynamics CRM
- Create basic reports
- Configure display and categorization options
- Control access to reports

Performance and Maintenance

- Identify hardware requirements for Microsoft Dynamics CRM
- Optimize the performance of Microsoft Dynamics CRM, Microsoft Dynamics CRM for Microsoft® Office Outlook®, reports, the Exchange E-mail Router, and the Microsoft Dynamics CRM databases.

Advanced Find

- Identify the different search options available in Microsoft Dynamics CRM
- Work with Advanced Find queries
- Save and export query results