



Introduction to Microsoft Dynamics CRM

- Dynamics CRM Overview
- Working with Dynamics CRM
- Processes and Functional Scenarios
- Working with Data

Sales and Marketing in Microsoft Dynamics CRM

- Introduction to Sales Management
- Lead Management
- Working with Opportunity Records
- Working with the Product Catalog
- Sales Order Processing
- Sales and Marketing
- Goal Management
- Sales Analysis

Data Management in Microsoft Dynamics CRM

- Intro to Extending Dynamics CRM
- Data Import Methods
- Preparing Data for Import
- Managing Duplicate Detection
- Importing Data via Microsoft Excel and Re-Import and Import Wizard
- Data Utilities within Dynamics CRM
- Troubleshooting Data Import Issues

Customer Service in Microsoft Dynamics CRM

- Customer Scenarios
- Case Management
- Knowledge Base
- Queue Management
- Entitlements
- Analysis, Reporting, and Goals
- Service Scheduling Scenarios

Customization and Configuration

- Introduction to Customizing CRM 2015
- Building a Security Model
- Customizing Entities
- Customizing Fields
- Managing Relationships
- Customizing Forms
- Business Rules
- Customizing Views
- Customizing Charts and Dashboards
- Additional Security Options
- Business Processes

Automating Microsoft Dynamics CRM with Business Process Management

- Reason to Automate?
- Introducing Business Process Management
- Business Process Management Solutions
- Business Rules
- Workflows
- Dialogs
- Troubleshooting Process Issues

Installation in Microsoft Dynamics CRM 2015

- System Requirements and Required Technologies
- Install Microsoft Dynamics CRM Server
- Install Microsoft Dynamics CRM Reporting Extensions
- Manage Microsoft Dynamics CRM with the Deployment Manager
- Upgrade to Microsoft Dynamics CRM 2015
- Email Management
- Microsoft Dynamics CRM for Microsoft Office Outlook
- Maintain and Troubleshoot a Deployment
- High Availability Options

Functional Application in Microsoft Dynamics Marketing

- Introduction to Microsoft Dynamics Marketing
- Getting Started with Microsoft Dynamics Marketing
- Lead Management and Landing Pages
- Email Marketing and Social Media Outreach
- Marketing Campaign Automation
- Marketing Reports and Analytics
- Marketing Project Management
- Managing Marketing Finances
- Microsoft Dynamics Marketing Connector for Microsoft Dynamics 365
- Setting up a Deployment for Success