MOC 80442A Introduction to Microsoft Dynamics CRM 2011

Course Summary

Description

This one-day instructor-led course provides an introduction to Microsoft Dynamics CRM 2011. The course focuses on the user interface and working with the application and provides a foundation for other Microsoft Dynamics CRM 2011 courses. The course describes Microsoft Dynamics CRM concepts, the Web interface, the Microsoft Dynamics CRM for Outlook interface, searching, and reporting.

Objectives
At the end of this course, students will be able to:

- Describe at a high level key Microsoft Dynamics CRM concepts.
- Explain how customer records, addresses, notes, attachments, connection records, and activities are recorded in Microsoft Dynamics CRM and how to configure personal options.
- Work with records and views.
- Use Microsoft Dynamics CRM for Outlook to track and synchronize items and manage offline capability.
- Search and report on Microsoft Dynamics CRM data.

Topics

- Microsoft Dynamics CRM Concepts
- Working with the Application
- Working with Records
- Microsoft Dynamics CRM for Microsoft Office Outlook
- Searching and Reporting

Audience

This course is intended for individuals who plan to implement, use, maintain, or support Microsoft Dynamics CRM in their organization. The course is intended for anyone who wants to gain foundational knowledge of Microsoft Dynamics CRM 2011.

Prerequisites

Before attending this course, students must have a working knowledge of the following:
- Microsoft Windows operating systems
- Microsoft Outlook
- Microsoft Word
- Microsoft Excel

Duration

One day

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Course Outline

I. Microsoft Dynamics CRM Concepts

This module provides a high-level overview of Microsoft Dynamics CRM and describes ways to navigate the application.

A. Microsoft Dynamics CRM functionality
B. Microsoft Dynamics CRM clients
C. Security
D. Microsoft Dynamics CRM records
E. The Get Started pane
F. Application navigation
G. Microsoft Dynamics CRM Help and the Resource Center
H. Lab : Navigate Microsoft Dynamics CRM

II. Working with the Application

This module explains how customer records are used in Microsoft Dynamics CRM. It describes how addresses, notes, attachments, connection records, and activities are recorded in Microsoft Dynamics CRM and how to configure personal options

A. Customer records
B. Addresses
C. Notes and attachments
D. Connections
E. Activities
F. Personal options
G. Lab : Work with Core Records and Personal Options

III. Working with Records

This module describes views and how to filter views. It further explains ownership of records, how to share records, how to delete and edit multiple records, how to import records, and how to run a mail merge.

A. Views
B. Record ownership
C. Sharing records
D. Deleting and editing records
E. Import records
F. Mail merge with Microsoft Word

IV. Microsoft Dynamics CRM for Microsoft Office Outlook

This module explains how to work with Microsoft Dynamics CRM for Outlook, how to manage tracked items, how records are synchronized from Microsoft Dynamics CRM to Outlook, how conditional formatting can be applied to lists of records, and how Microsoft Dynamics CRM for Outlook offline capability works.

A. Integration with Outlook
B. Tracking Outlook items
C. Synchronizing records
D. Conditional formatting
E. Offline capability

V. Searching and Reporting

This module describes ways to find and report on data in Microsoft Dynamics CRM

A. Search using quick find
B. Search using Advanced Find
C. Manage saved views
D. Export to Excel
E. Default reports
F. The Report Wizard
G. Overview of charts and dashboards

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