

## **Introduction to Microsoft Dynamics CRM 2011**

**Duration: 1 day**

**Course Code: SSM80442**

### **Course Aims and Objectives**

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.

### **Who should attend?**

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.

### **Assumed Knowledge**

Before attending this course, students must have a working knowledge of the following:

- Microsoft Windows operating systems
- Microsoft Outlook
- Microsoft Word
- Microsoft Excel

### **Module 1: Microsoft Dynamics CRM Concepts**

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

#### **Lessons**

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Security
- Microsoft Dynamics CRM records
- The Get Started pane
- Application navigation
- Microsoft Dynamics CRM Help and the Resource Center

## **Lab: Navigate Microsoft Dynamics CRM**

After completing this module, students will be able to do the following:

- Summarize at a high-level Microsoft Dynamics CRM and its sales, marketing, and service areas.
- Describe the Microsoft Dynamics CRM Web and the Microsoft Dynamics CRM for Outlook clients.
- Explain the Microsoft Dynamics CRM security model.
- Summarize Microsoft Dynamics CRM records.
- Explain the purpose of the get started pane.
- Describe ways to navigate the application.
- Show how to use Microsoft Dynamics CRM Help and the Resource Center.

## **Module 2: 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.

### **Lessons**

- Customer records
- Addresses
- Notes and attachments
- Connections
- Activities
- Personal options

## **Lab: Work with Core Records and Personal Options**

After completing this module, students will be able to do the following:

- Explain how customer records are used in Microsoft Dynamics CRM.
- Record addresses.
- Use notes and attachments.
- Describe the purpose of connection records.
- Use activity records to track customer interactions.
- Personalize Microsoft Dynamics CRM.

### **Module 3: 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.

#### **Lessons**

- Views
- Record ownership
- Sharing records
- Deleting and editing records
- Import records
- Mail merge with Microsoft Word

#### **Lab: Import Contacts**

#### **Lab: Mail Merge**

After completing this module, students will be able to do the following:

- Describe views and how to filter views.
- Explain ownership of records.
- Describe the purpose of sharing and how to share records.
- Describe how to delete and edit multiple records.
- Describe how to import records into Microsoft Dynamics CRM.
- Describe the process for running mail merge on Microsoft Dynamics CRM records.

### **Module 4: 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.

#### **Lessons**

- Integration with Outlook
- Tracking Outlook items
- Synchronizing records
- Conditional formatting

- Offline capability

**Lab: Tracking Records****Lab: Configure Outlook Synchronization Filters****Lab: Offline Capability****Module 5: Searching and Reporting**

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

**Lessons**

- Search using quick find
- Search using Advanced Find
- Manage saved views
- Export to Excel
- Default reports
- The Report Wizard
- Overview of charts and dashboards

**Lab: Search for Records****Lab: Export Records****Lab: Reports**

After completing this module, students will be able to do the following:

- Find records using quick find.
- Search for records using Advanced Find.
- Manage saved views.
- Export records to Microsoft Excel.
- Describe the default reports included in a new installation of Microsoft Dynamics CRM.
- Create reports using the Report Wizard.
- Provide an overview of dashboards and charts