INFOSOFT IT SOLUTIONS

Training | Projects | Placements

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CRM Course Content

Module 1: Overview and Planning

- Lessons

- Overview

- Server Setup

- Domain Accounts

- Planning

- Architecture

- Planning Hardware and Software

- RAID Subsystem

- Disaster Recovery

- Staff Skills Review

- Naming Convention

- Components

Module 2: Installation

- Setup Utility

- Install an Environment

- Perform a Single-Computer Installation

- Configuration Utilities

- Install Microsoft Dynamics CRM AX in Silent Mode

- Office Add-Ins

- Initialization Checklist

Module 3: Managing Users and Security

- Security Overview

- Authentication

- Adding Users

- Adding Active Directory Groups

- Role Based Security

- Extensible Data Security Framework

- Customizing Security

Module 4: Services

- Services Overview

- Administration

- Integration and Planning

- Infrastructure and Deployment

- Troubleshoot and Monitor Services

- Security

Module 5: Workflow

- General Features

- Architecture

- Create a Workflow

- Graphical Workflow Editor

- Configure an Approval Element

- Configure Decisions

- Configure a Parallel Activity

- Configure a Sub Workflow

- Configure Line-Item Workflows

- Configure Tasks

- Completing a Workflow Configuration

- Workflow Types

- Administration

- Inquiries and Reports

Module 6: Analytics

- Cube Overview

- Installation and Deployment

- Configuration

- Security

Module 7: Reporting

- Overview

- Planning Considerations for Reporting

- Batch Support

- Installation and Deployment

- Configure Report Servers

- Security Considerations

Module 8: Enterprise Portal

- About Enterprise Portal
- Installation
- Security and Authentication
- Deployment
- Configuration and Administration

Module 9: Administration

- Model Management
- System Monitoring
- System Administration
- Set Up and Manage Emails
- Set Up and Manage Batch Processing
- Set Up and Manage Alerts

Module 10: Organization Model

- About Organizations and Organizational Hierarchies
- Plan the Organizational Hierarchy
- Working with Legal Entities
- Working with Operational Units
- Working with Organizational Hierarchies
- Organization Hierarchy Examples

Microsoft Dynamics CRM AX Technical [D365] Course Syllabus
Module 1: Introduction

- Architecture

- Comparison D365 vs AX 2012 vs AX 2009

- The Cloud Model - Pros and Cons

- Introduction to Azure

- 3 tier vs n-tier Architecture

- Licensing Model

Module 2: Application Explorer

- Model Management

- Packages

- Introduction to LCS

- Code Migration

- D365 Setup and Server Architecture

Module 3: D365 Menu in VS

- Classic View vs Model View

- Data Types

- Primitive

- Base Enum

- Extended Data Types

Module 4: Data Model

- Tables

- Views

- Queries

- Basic Data Entities

- Composite Data Entities

- Aggregate Data Entities

- Maps
- Table Collections

Module 5: Code

- OOP's and Classes in D365
- Runnable Classes
- New Keywords and D365 way of handling
- classes
- Exception Handling in D365
- Macros

Module 6: User Interface

- Forms
- Form Patterns in D365
- Tiles
- Menus
- Menu Items

Module 7: Reporting in Dynamics 365

- SSRS Reports
- Power BI Integration
- Label Handling in D365
- Workflows in D365
- Configuration Keys
- References

Module 8: XDS and Security Model in D365

- Roles

- Duties

- Privileges

- Permissions

   Module 9: Customization in D365

- Extensions

- Over layering vs Extensions

- Base Enum Extensions

- Extended Data Type Extensions

- Table Extensions

- Query Extensions

- Views Extensions

- Data Entity Extensions

- Class Extensions

- Delegates

- Event Handling

- Chain Of Command

- Form Extensions

- Menu Item Extensions

- Menu Extensions

- Security Extensions

   Module 10: Services

- OData Services

- Compare Tool

- Deployment Model

- Moving Customization to Production

- Upgrade from AX 2012 to D365

- Using Trace Parser in D365

- Task Recording