



## Key Data

**Course Number:** 8910

**Number of Days:** 1

**Format:** Instructor-Led

**Certification Exams:** None

**Certification Track:** None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

## Course Syllabus

### ***What's New in Microsoft Dynamics CRM 4.0***

*Elements of this syllabus are subject to change.*

This one-day instructor-led course provides students with the knowledge and skills to begin planning for Microsoft Dynamics CRM 4.0.

#### **Audience**

This course is intended primarily for Microsoft partners and customers who are already familiar with Microsoft Dynamics CRM 3.0. The material covers functionality that applies to a wide range of audiences, from business users to system administrators to developers.

#### **At Course Completion**

After completing this course, students will be able to:

- Describe key new features of Microsoft Dynamics CRM 4.0.
- Add an organization and add business units to it
- Export, edit, and import data by using the Import Data Wizard.
- Import a customization
- Create, publish, and monitor a simple workflow.

#### **Prerequisites**

Before attending this course, students must have:

- Familiarity with Microsoft Dynamics CRM 3.0.

#### **Student Materials**

The student kit includes a comprehensive workbook.

## Module 1: Overview

This module provides a brief overview of the main new features in Microsoft Dynamics CRM 4.0.

Lesson
<ul style="list-style-type: none"><li>▪ Key New Features</li></ul>

After completing this module, students will be able to:

- List the main feature areas that will be covered in this course

## Module 2: Installation and Deployment

This module describes improvements to installation and deployment.

Lessons
<ul style="list-style-type: none"><li>▪ Upgrading to Microsoft Dynamics CRM 4.0</li><li>▪ Versions and Licensing</li><li>▪ Server Setup Changes</li><li>▪ System Requirements</li><li>▪ Microsoft Dynamics CRM E-mail Router</li><li>▪ Microsoft Dynamics CRM for Outlook</li></ul>

After completing this module, students will be able to:

- Describe the features associated with upgrading to Microsoft Dynamics CRM 4.0
- Determine which type of deployment and license is suitable for their needs
- Describe the new enterprise level features
- Describe the system requirements
- Describe improvements to the Microsoft Dynamics CRM E-mail Router

## Module 3: Configuration

This module describes an assortment of new features that control how organizations configure and implement Microsoft Dynamics CRM 4.0.

Lessons
<ul style="list-style-type: none"><li>▪ Multiple Organizations</li><li>▪ Multilingual User Interface</li><li>▪ Multiple Currencies</li><li>▪ Add Users Wizard</li></ul>
Lab 3.1: Maintaining Multiple Organizations
<ul style="list-style-type: none"><li>▪ Add a new organization</li><li>▪ Add business units for the new organization</li></ul>

After completing this module, students will be able to:

- Identify how multi-tenancy provides more than one organization on a single Microsoft Dynamics CRM server
- Describe what the multilingual user interface does
- Describe the multicurrency feature
- Describe what the Add Users Wizard does

## Module 4: Data Management

This module describes tools that improve the data import and data migration processes.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Import Data Wizard</li> <li>▪ Data Migration Manager</li> <li>▪ Duplicate Detection</li> </ul>
<b>Lab 4.1: Enriching Data</b>
<ul style="list-style-type: none"> <li>▪ Export the data</li> <li>▪ Edit the data</li> <li>▪ Import the data</li> <li>▪ View the results</li> </ul>

After completing this module, students will be able to:

- Describe the new data import process
- Describe the new data migration process
- Describe the duplicate detection feature

## Module 5: Microsoft Dynamics CRM for Outlook and Business Applications

This module focuses on improvements to Microsoft Dynamics CRM for Outlook and enhancements in reporting and business application features.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Changes in Microsoft Dynamics CRM for Outlook</li> <li>▪ Feature and User Interface Changes</li> <li>▪ Using the Report Wizard</li> <li>▪ Other Reporting Changes</li> </ul>

After completing this module, students will be able to:

- Describe improvements in Microsoft Dynamics CRM for Outlook
- Describe changes in functionality to Lookup, converting activities, and mail merge
- Describe changes to reporting features
- Describe changes to exporting and Advanced Find

## Module 6: Customization

This module describes several new features that enable organizations to customize Microsoft Dynamics CRM 4.0 to meet their business requirements.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Entity Relationship Enhancements</li> <li>▪ Importing and Exporting Customizations and Configurations</li> <li>▪ View Enhancements</li> </ul>
<b>Lab 6.1: Import Customizations</b>
<ul style="list-style-type: none"> <li>▪ View contact before changes</li> <li>▪ Import customizations</li> <li>▪ View contact after changes</li> <li>▪ Export customizations</li> </ul>

After completing this module, students will be able to:

- Describe the new data import process
- Describe the new data migration process
- Describe the duplicate detection feature

## Module 7: Workflow

This module describes the improved workflow model.

Lessons
<ul style="list-style-type: none"><li>▪ Workflow Access</li><li>▪ Workflow Improvements</li></ul>
Lab 7.1: Workflow Lifecycle
<ul style="list-style-type: none"><li>▪ Create the workflow</li><li>▪ Add a check condition</li><li>▪ Add a conditional branch</li><li>▪ Add a default action</li><li>▪ Publish the workflow</li><li>▪ Trigger the workflow</li><li>▪ Confirm that the workflow ran successfully</li></ul>

After completing this module, students will be able to:

- Describe how users have access to the workflow lifecycle
- Describe improvements to workflow functionality

## Module 8: Programmability

This module provides a high-level overview of new features that help developers customize Microsoft Dynamics CRM 4.0 to address specific business needs.

Lessons
<ul style="list-style-type: none"><li>▪ Event Framework</li><li>▪ Web Services</li><li>▪ Client-Side Features</li></ul>

After completing this module, students will be able to:

- Describe key features of the event framework, including plug-ins
- Describe major enhancements to the Web services
- Describe new client-side programming features