



## Training Program

# MS Dynamics 365 CRM Functional Training



**1.2 Million**  
Learners



**1-1 Personalized**  
Mentorship



**60% Average**  
Salary Hike

# About Program



## Learning Format

Online / Offline



## Trainer

Industry Professionals



## Career Services

By Croma Campus

Our course content has been specifically designed to turn you into a skilled professional in this industry. As a part of your certification training, you will receive enough study material and recorded video sessions that will help you cover all the latest trends and features in this course. The training session will comprise important sections, features, advantages, and scope of the technology in the coming years. Moreover, our qualified trainers will help you imbibe all the required skills, and information in a much better manner to help you in you becoming an expert in this technology. Post the completion of your course, you will receive a training certificate recognized world-wide.

## What Make Us **Tick**



### Career-oriented Sessions

Attend 25+ career-oriented sessions by industry mentors and prepare your career trajectory



### Mock Interview Preparation

Prepare with mock interviews including most asked questions by top employers



### Dedicated Job Portal Access

Get exclusive access to 100s of job postings per month on Croma Campus Intellipaat's job portal



### Profile Building

Craft a resume and LinkedIn profile and make an impression on top employers



### 1:1 Mentoring Sessions

Get 1:1 guidance at every step in your career transition to respective Technology



### Guaranteed interviews

Get job interviews with 400+ hiring partners including promising startups and top MNCs

# Microsoft Dynamics CRM Functional Training Curriculum

## ✔ Microsoft Dynamics CRM Overview

- What is CRM?
- How to Access CRM?
- How to Activate 30 days CRM online trial version
- Difference between CRM Online and CRM on- premise Version
- Three Modules in CRM – Sales, Marketing and Services
- CRM Records:
  - Owner of the record
  - Status of the record
  - Sorting
  - Assigning and sharing Record
  - Views –System Views and Personal View
  - Editable Grid
- Search and Advanced find search
- MS Dynamics CRM Architecture
- Setting Personal Options

## ✔ Customizing Entities and Forms

- MS CRM Entity Model
- Customization Concepts – Entity Types and Attributes Data Type
- Creating Custom Entities, Attributes and main form and Global Option Set
- Form Customization Overview.
- Create and Modify Forms.
- Types of Forms in CRM –
  - Quick Create Form
  - Quick View Form
  - Mobile form
- Create and manage Multiple Main Form
- Role based Form

## ✔ Managing Relationships

- Types of Entity Relationships
- Relationship Behaviours
- Creating Entity Relationships

## ✓ Solution Concepts

- Default Solution
- Managed Solution
- Unmanaged Solution
- Managed Properties

## ✓ Building a Security Model in Microsoft Dynamics CRM

- Introduction to Business Unit
- Team
- User
- Security Model in CRM –
  - Role Based Security, Access rights and Privileges
  - Record Level Security
  - Field Level Security
- Auditing Overview

## ✓ Introduction to Sales Management

- Sales Life Cycle
- Convert Activity Records to Leads
- Qualifying and Disqualifying Leads
- Create Opportunities and Work with Opportunity Forms and records
- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Order
- Working with Invoices
- Create, Maintain, and Use Sales Literature

## ✓ Working with the Product Catalog

- Unit Group and configure Unit
- Adding and Maintaining Products
- Price List and associate price list with Product
- Discount List
- Product Family,
- Product and Product Bundle configuration

## ✓ Introduction to Marketing Management

- Marketing Life Cycle:
- Campaign and Quick Campaign,

- Marketing list- Static and Dynamics Marketing list
- Campaign Activity
- Campaign Response

## ✓ Introduction to Service Management

- Overview of service module
- Service Management & Service Scheduling
- Case Entity
- Routing Rules
- Queue Management
  - Private Queue & Public Queue
  - Add case to a queue based on routing rule
- SLA (Service Level Agreements)
- Type OF SLA
  - Standard SLA & Enhanced SLA
- Using business scenario to implement SLA
- Entitlement
  - Create an entitlement: From Template & from scratch
  - Define Entitlement Terms
  - Associate entitlements to cases
  - Using business scenario to implement Entitlement
  - Using Service Level Agreement (SLA) with Entitlement
- Knowledge Base Article: (a) Directly create (b) Create from Template
- Creating Subject for knowledge-based Article

## ✓ Reports

- Running Built-in Reports
- Creating and updating Report in CRM
- Grouping, Sorting and Exporting Reports

## ✓ View, Charts and Dashboard

- View
  - Personal View & System View

- Charts
  - Personal Chart & System Chart
- Dashboard
  - Personal Dashboard & System Dashboard

### ✓ Email Functionality in Microsoft Dynamics CRM

- Email Template
- Email Signature
- Configure Email

### ✓ Configuring Business Rules in Microsoft Dynamics CRM

- Configure Business Rules

### ✓ Implementing Business Processes

- Overview of Business Process Flow
  - Creating Business Process Flow with condition
- Overview of Workflow
  - Creating Workflows through Workflow Designer
- Overview of Dialogs
  - Creating Dialog Pages, Prompt and Response
  - Working with Input Parameters in Dialogs

### ✓ Plugins

- Overview of Plug-ins
- The Event Execution Pipeline
- Deploying Plugins
- Debugging Plugins

### ✓ Application Event Programming

- Client-side scripting using Java Script
- Working with I-Frames
- Working with Web Resources

### ✓ Data management

- Duplication Detection Settings and Rules
- Bulk Record Deletion

## ✓ Ribbon Customization

- Creating & Hiding Ribbon Elements
- Enabling & Disabling Ribbon Elements
- Working with Site Maps

## ✓ Filed Service

- Creating & Hiding Ribbon Elements
- Enabling & Disabling Ribbon Elements
- Working with Site Maps

## ✓ Placement Guide

- Tips to clear an Interview
- Common Interview questions and answers
- Microsoft Dynamics 365 Functional Interview Questions
- Resume Building Guide
- Career roadmap and certifications
- Attempt for the Global Certification Exam
- Start applying for Jobs

# e-Learning through LMS

## Learning Management System

Our LMS (LearnPitch) is for the administration, documentation, tracking, reporting, automation, and delivery of educational courses, training programs, or learning and development programs.

Our LMS has been designed to identify training and learning gaps, using analytical data and reporting to keep you up with the class activities.

## Key Features Learning Management System



Live Sessions with Class recordings



Get study material with Assignments.



Track your curriculum covered.



Track your class wise attendance



Share your feedback for Trainer & Training



Get your Training Certificate from LMS





# Training **Certification**

## Earn Your **Certificate**

Your certificate and skills are vital to the extent of jump-starting your career and giving you a chance to compete in a global space.



# Croma Campus! Reviews



"The most rewarding part of my experience has been achieving a prestigious certification in the subject that I love. Moreover, the training offered out by the specialists are of world-class and prepares out the students for corporate world. For me Croma Campus means a lot."

*"By The  
Students  
For The  
Students,,*

## Your Success Is **Our Story**



**Bharat**

“ I am fully satisfied with the excellent training services received by the expert staff at Croma Campus. I want to thank Croma Campus for providing me with the most innovative and affordable training services for learning all the software testing procedures and guidelines. ”



**Ankit**

“ It was a lifetime experience for me to get trained by IT Experts of Croma Campus. What I liked most about the training was the consistent high-quality education, which was friendly and co-active. The placement department was also proactive, they keep me updated regarding new job opportunities and provide the grooming session to crack the interview. At last, I would like to thank all faculty members of Croma Campus for their immense help and support. ”



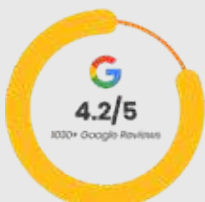
**Nitesh**

“ Without any second thought, I will give Croma Campus 10/10. Their placement department is highly proactive. I remember they started scheduling interviews for me from the very next day when I told them my course has been completed. These people are doing a phenomenal job and I highly recommend Croma Campus to everyone. ”



**Shams Khan**

“ Croma Campus is doing a phenomenal job in the IT training industry. The reason why I decided to join their training program was that they provide quality training at very a nominal price. Plus, the online training mode was also a factor due to which I decided to join the training program of Croma Campus as I didn't want to attend physical classes. ”



# Meet Our Team



## Sales Team

Our Sales team is highly passionate, emphatic, positive attitude, great listening skills, ability to deliver quick solutions, and they are multitasker too. Our team always remains up-to-date about all the latest technologies and market trends. With effective communication skills, they always work to deliver the right information to customers when it is needed.



## Product Team

Our product team is highly functional and collaborative working together to achieve the common outcome of designing exceptional digital experiences. Each of our members is a contributor to help us achieve success in long-run. Sitting at the high-end of technology and innovation, team helps to deliver high-end customer experiences and always comes out with a big idea as a game-changing plan.



## Marketing Team

Our Marketing team works as gladiators and helps us to achieve business success in all possible ways. They are included in almost everything either it is building a brand, creating brand awareness, promoting products or services, delivering trailblazing customer experiences or increasing engagement at public forums. They are the true backbone of the Company.



## Content Team

Our content team is responsible for ideation, creation, optimization, and distribution of content throughout the company. The team always starts its work with a strategy, how to create high-quality contents, and how to promote or share the content. Our in-house content team help us to produce all types of contents either they are educational content pieces, marketing content, SEO content, or any other forms too.



## Customer Access Team

This is the team that has actually been taken up us from reactive state to a pro-active state. The team utilizes high-valued solutions to satisfy customers in all possible ways. It is truly said that no company can succeed if your customers are not satisfied. And our customer success team is dedicatedly working to keep all the customers satisfied and we always consider our customer feedback on priority.



## HR Team

Our HR team is committed to provide high-end solutions to employees as they require. Our HR team has the right skills and knowledge to make sure that the HR department can always be legally and strategically successful. They know how to keep employees motivated all the time with the best HR policies and fun activities too from time to time.





# Glimpse Of Our Office

## Look Who We are

Our office's infrastructure comprises all the necessary software and network resources that are required to deliver IT & Design, Human Resources, Digital Marketing, and training services.

We are well-equipped with bright designed work bays for employees and managers having separate cabins with spacious cafeteria and training classrooms.



# About Croma Campus

“ Our Mission is to Build Nation through Education & Beyond Limitation. ”

Croma Campus Training & Development Private Limited is an education platform providing rigorous industry-relevant programs designed and delivered in collaboration with world-class faculty, industry & Infrastructure. In the past 12 years we have trained 18000+ candidates and out of which we are able to place 12000+ professionals in various industries successfully.

We Are  
Affiliated  
With Different  
Partners



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