





# **Microsoft Dynamics 365 CRM Techno-Functional Certification Training**







**Online Students** 



Trainers





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200+











1-1 Personlized Mentorship





www.cromacampus.com



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 Trick



#### **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 200 job postings per month on Intellipaat's job portal



#### **Profile Building**

Craft a Cloud Computing 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 Cloud Computing



#### Minimum 3 guaranteed interviews

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

# Program FEATURES



# Key Highlights



### Who Should Enroll in this Program?

Any technical degree or equivalents such as B.tech, M.tech, a degree in engineering, bachelor/master's in computer science, and basic programming knowledge.

This program caters to a wide audience, from those who are hoping to enter the industry

- Fresh graduates who are intent on taking the plunge into the job market
- Developers who are working in one of the functional roles of front-end or back
- Development and want to shift to full stack development
- Test engineers, system engineers, and others who want to make a career shift to

#### 🤣 Module 1 : 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:
  - $\diamond$  Owner of the record
  - $\diamond$  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

#### Module 2 : 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

#### Module 3 : Managing Relationships

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

#### Module 4 : Solution Concepts

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

#### Module 5 : 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

#### Module 6 : 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

#### Module 7 : 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

#### Module 8 : Introduction to Marketing Management

- Marketing Life Cycle:
- Campaign and Quick Campaign,
- Marketing list- Static and Dynamics Marketing list
- Campaign Activity
- Campaign Response

#### Module 9 : 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
  - $\diamond$  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

#### Module 10 : Reports

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

#### Module 11 : View, Charts and Dashboard

• View

- ♦ Personal View & System View
- Charts
  - ♦ Personal Chart & System Chart
- Dashboard
  - ◊ Personal Dashboard & System Dashboard

#### Module 12 : Email Functionality in Microsoft Dynamics CRM

- Email Template
- Email Signature
- Configure Email

#### Module 13 : Configuring Business Rules in Microsoft Dynamics CRM

• Configure Business Rules

#### Module 14 : 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

#### Module 15 : Plugins

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

#### Module 16 : Application Event Programming

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

#### 🥝 Module 17 : Data management

- Duplication Detection Settings and RulesL
- Bulk Record Deletion
- Data Maps and Date Imports

#### 🤡 Module 18 : Ribbon Customization

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

#### Module 19 : Filed Service

- Overview of Field Service
- Work Order Life Cycle
- Work Order Creation
- Service Task Creation

#### 🥝 Module 20 : Working with XRM tool box

- Overview
- How to use plugins
- How to connect with CRM
- Use 5 common plugins

#### Module 21 : Email configuration

- Email server creation
- Mailbox enable and test
- Queue creation
- Configuration

#### Module 22 : Working with data & Customization

- Overview of FetchXML
- Overview of Odata query
- Use FetchXML to fetch data from CRM
- Update data in CRM
- Use Odata query to fetch data from CRM
- Push data into CRM

# 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 class wise attendance



Share your feedback for Trainer & Training

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Track your curriculum covered.



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 is Nasscom Certified







www.cromacampus.com

# 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.



Umesh

66 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.













CROMA CAMPUS



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# About Croma Campus

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



🖂 helpdesk@cromacampus.com | 🌐 www.cromacampus.com

