CRM 2013/2015 Administrator - Agenda

Note: This training is focused on organizations anticipating the update to 2013 and/or 2015.

CRM 2013 New Features

- 2013 Platform Changes
    - Authentication
    - Data Encryption
    - Image Data type
    - Phone number formatting (click to call)
    - FetchXML: Left Outer Join
    - Multi-entity quick find for mobile search
    - Setting up Access Teams
- 2013 Configuration
    - Modifying QuickCreate Forms
    - Using QuickView Forms
    - Creating Real Time Workflows
    - Working with Portable Business Logic
    - Creating Process flows
    - Configuring Mobile express for 2013
- 2013 Customization
    - Introduction to the 2013 SDK Changes
    - Introductions to Actions
    - Customizing the Command Bar using the Ribbon XML

CRM 2013 SP1 New Features

- Introduction / Overview
- Customer Service – What changed?
- Entitlements and SLA (Service Lifecycle Agreement)
- Timer Control
- New System Settings
- Holiday and Customer Service Schedule
- Queue Enhancements
- Routing Rules
- Automatic Case Creation Rules
- Social Profiles and Social Activities
- Case Closure Behavior
- Solution Awareness
- Merge Cases
- Child Cases
- Status Reason Transitions
- Duplication Detection
- Miscellaneous Items
- Solution Export Behavior
- Mobility Updates
- Server Side Sync
- SharePoint
- Outlook Compatibility

CRM 2015 New Features

- Enhanced Preview Content Experience
- Licensing Preview
- CRM online admin experience
- Enhanced Business Processes
- Mobile Sales Enhancements
- Enhanced Business Rules and Search
- Security Enhancements
- Outlook and Sync Enhancements
- Sales Product Taxonomy
- SLA Enhancements
- Hierarchy Visualization
- Calculate Fields and Rollups
- Social Insights in CRM On-Premise
- Enhanced Upgrade Experience

Upgrade Process

- Upgrade Process & Readiness
  - Ensuring Upgrade Readiness
  - Database Merge
  - PowerShell
  - Solution Upgrading
  - Forms upgrade
  - Version number updates
  - Outlook Client
- System New Features
  - Configuring the server-side sync
  - Troubleshooting
    - Trace Alerts
  - Managing Global Settings such as Auto Save
  - Quick Find Auto-Indexing
  - Best Practice Analyzer
  - New CRM services
    - CRM Monitoring service
    - VSS Writer
  - Activity Feeds and Yammer Integration

  - Other stuff
    - Help center
    - Resources