

CRM 2013/2015 ADMINISTRATOR AGENDA

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

Mod 1 - Upgrade Process & Readiness

- Ensuring Upgrade Readiness
- Database Merge
- PowerShell
- Solution Upgrading
- Forms Upgrade
- Version Number Updates
- Outlook Client

Mod 2 - 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

Mod 3 - 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

Mod 4 - 2013 Customization

- Introduction to the 2013 SDK Changes
- Introductions to Actions
- Customizing the Command Bar Using the Ribbon XML

Mod 5 - 2013 System New Features

- Configuring the Server-Side Sync
- Troubleshooting - Trace Alerts
- Managing Global Settings such as Auto Save
- Quick Find Auto-Indexing
- Best Practices Analyzer

Mod 5 - 2013 System New Features [continued]

- New CRM services
 - CRM Monitoring
 - VSS Writer
- Activity Feeds and Yammer Integration

CRM 2013 SP1

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

CRM 2015

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

Other Stuff

- Help Center
- Resources