



# CRM

## UNIVERSITY

### FOR DYNAMICS 365

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## COURSE CATALOG

# CRM UNIVERSITY FOR DYNAMICS 365 COURSE CATALOG

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## About CRM University for Dynamics 365

CRM University for Dynamics 365 is designed to be foundational training for those who are responsible for implementing and supporting CRM for Dynamics 365 within your organization. It is frequently utilized at the beginning of a CRM for Dynamics 365 rollout, but may also be given later in the rollout or after deployment to enhance the knowledge of your teams.

### Target Audience

CRM University for Dynamics 365 training content is framed in the context of how the out-of-the-box application works. Participants get an understanding of how the CRM for Dynamics 365 processes and architecture can be used as the “raw materials” to be leveraged and customized to support your unique organizational processes. Recommended attendees for CRM University training are those involved in the following tasks:

Analyzing Business Processes Gathering

Requirements

Matching Requirements with CRM Functionality

Architecting CRM Solutions

Configuring CRM

Extending CRM with custom code

Integrating with CRM Testing  
CRM

Developing Training Materials  
Training End-Users Supporting  
CRM Infrastructure  
Supporting CRM Users

CRM University training is NOT recommended for end-users because it is out-of-the-box training. End-users should be provided more process-focused, role-based training that does not require them to make mental leaps into how they would use the application.

## Delivery Options

You can either attend a pre-scheduled training or bring a CRM University trainer to you. Upcoming CRM University trainings are listed on the PowerObjects website. If you prefer to bring a trainer onsite, you may choose a predefined training or build your own training using the individual courses listed in this catalog.

## What's Included?

The fixed price for CRM University training includes participant workbooks and instructor PowerPoints. Each participant is provided with their own training environment for the labs; however, they must bring their own lap tops. Class sizes are limited to a maximum of 20 people. All CRM University courses are based on CRM for Dynamics 365; however they will be easily applicable to CRM 2013, 2015, and 2016 users, and the instructor will point out whenever a feature is only available in CRM for Dynamics 365.

## Certificates

Certificates provide recommended learning paths for various roles in your organization, and they also offer achievements to pursue for completing multiple trainings from CRM University.

### CRM for Dynamics 365 Administrator Certificate

9 Days

Targeted towards those who will initially architect CRM and/or be responsible for maintaining the CRM system's ongoing alignment with business processes. Administrators are often required to customize the CRM for Dynamics 365 user-interface to keep it simple and intuitive for the end-users. Administrators may also configure basic reports using the out-of-the-box toolset and deploy reports to managers and end-users. Lastly, administrators may create and maintain automated processes such as workflows, dialogs, and process flows to support business needs. These skills are all included in the Administrator Certificate.

In order to earn the CRM for Dynamics 365 Administrator Certificate, complete the following CRM University Trainings:

- CRM Boot Camp for Dynamics 365 (5 Days)

- CRM Business Intelligence Wizard for Dynamics 365 (3 Days)

- Advanced CRM Processes for Dynamics 365 (2 Days)

## CRM for Dynamics 365 Trainer Certificate

7 Days

CRM for Dynamics 365 trainers may be responsible for conducting train-the-trainer within an organization or they may be training end-users directly. Either way, trainers need a foundational knowledge of everything CRM for Dynamics 365 can do. Even if the trainers are not customizing CRM for Dynamics 365, it is helpful to have a broad view of the sales, marketing, and service capabilities, as well as the administration (behind the scenes) in order to teach CRM for Dynamics 365 in context and answer end-user questions about what is possible. CRM for Dynamics 365 trainers may also be a feedback channel facilitating a bi-directional communication to the CRM for Dynamics 365 Administrators. However, CRM for Dynamics 365 trainers focus more on end-user processes and “day in the life” of the end-users than on technical design of the application. It’s critical that CRM for Dynamics 365 trainers are able to connect the CRM for Dynamics 365 functionality with the value it is providing users and convey both the organizational goals for using CRM, as well as the “What’s in it for me” for end users. All of these things are covered in the CRM for Dynamics 365 Trainer Certificate.

In order to earn the CRM Trainer Certificate, complete one of the following CRM University Trainings:

- CRM Boot Camp for Dynamics 365 (5 Days) Or
- CRM Fast Track for Microsoft Dynamics 365 (2 Days)
- CRM Prepare to Train for Microsoft Dynamics 365 (3 Days)

## CRM for Dynamics 365 Developer Certificate

5-8 Days

Although CRM developers primarily focus on technical work, they need a foundational understanding of the raw materials they are working with - this is the CRM for Dynamics 365 platform. That is why the CRM developer starts with a walk-through of the out-of-the-box capability. CRM developers then build on top of that foundation using the Software Development Kit and supported methods for extending CRM beyond what the built-in toolset can do. CRM developers focus on automation and scripts that can be built on the client side and server side. They also focus on how to integrate with CRM for Dynamics 365 through database web service calls.

All of these things are covered in the CRM for Dynamics 365 Developer Certificate.

In order to earn this CRM for Dynamics 365 Developer Certificate, complete the following CRM University for Dynamics 365 Trainings :

- CRM Boot Camp (5 Days) Or
- CRM Fast Track for Dynamics 365 (2 Days)
- CRM Developer Fast Track for Dynamics 365 (3 Days)

Note: This training consists of the individual courses Extending CRM for Dynamics 365 Overview (1 Day), Scripting and Web Resources (1 Day), Extending CRM for Dynamics 365 with Plugins (.5 Days), Integration Options (.25 Days), What’s Different about CRM for Dynamics 365 Reports (.25 Days)

## Trainings

Trainings are bundles of individual courses thoughtfully combined into multi-day offerings. CRM University for Dynamics 365 trainings are offered in-person or they can be brought onsite to your location. You can view upcoming trainings on the PowerObjects Events web- page.

### CRM Boot Camp for Dynamics 365

With a focus on the business use of CRM for Dynamics 365, the boot camp covers the entire application in detail. Using hands-on labs in a training environment with fictional data, participants gain a broad overview of everything CRM for Dynamics 365 can do out-of-the-box. This includes the sales, marketing, and service processes, as well as reports and dashboards, system administrator functions, and system customizer functions.

Audience: Intermediate technical recommended. Understanding of data and relational databases helpful. Since the CRM Boot Camp is focused on the application and not on processes, this training is not recommended for end-users, but rather is more appropriate for those who will be customizing or supporting the application.

Duration: 5 Days

### Topics Covered

- + CRM for Dynamics 365 Overview and Navigation
- + Sales, Marketing, and Service
- + Advanced Find, Charts, Dashboards, and Report Wizard
- + Users, Teams, Security Roles, and Security Structure
- + Data Management and Duplicate Detection
- + Processes: Workflows, Dialogs, and Process Flows
- + Configuration: Forms, Fields, System Views, and Charts

## CRM Fast Track for Dynamics 365

New to CRM for Dynamics 365? This “mini boot camp” will take you through the entire application in two days. The trainer will demonstrate the built-in features of CRM for Dynamics 365 and discuss their business use. From there, you’ll take a look under the hood to see how CRM for Dynamics 365 can be customized to support unique business processes. Participants will be given access to a demo environment.

Audience: Intermediate technical to advanced technical understanding and previous experience with similar CRM systems will be necessary to follow the CRM for Dynamics 365 walk-through with few hands-on exercises.

Duration: 2 Days

### Topics Covered

- + CRM Overview and Navigation
- + Sales, Marketing, Service
- + Advanced Find, Charts, Dashboards, and Report Wizard
- + Users, Teams, Security Roles, and Security Structure
- + Data Management and Duplicate Detection
- + Processes: Workflows, Dialogs, and Process Flows
- + Configuration: Forms, Fields, System Views, and Charts

## CRM Update for Dynamics 365

This course will get you up-to-date on the new features of CRM for Dynamics 365 and how to employ those into your business. This course will help you understand how to configure new features via a sandbox environment.

Audience: Intermediate knowledge of administering and customizing prior versions of CRM required.

Duration: 2 Days

### Potential Topics May Include

- + CRM for Dynamics 365 App for Outlook Enhancements
- + Search Enhancements
- + Mobile Enhancements
- + Editable Grids
- + Business Processor Flow Editor
- + Additional Action Capabilities in Work Flows
- + Learning Paths
- + PowerBI Integration

## Prepare to Train CRM for Dynamics 365

If you have the responsibility to conduct end-user training for your CRM system, you need both a foundational understanding of CRM, as well as training skills and practice with effective training.

In this CRM Train-the-

Trainer for Dynamics 365 course, you will learn training techniques and tips for designing and building a successful training program. You will experience a sample of an end-user training session on CRM for sales. Then you will learn about the process of planning, preparing, facilitating and evaluating CRM for Dynamics 365 training. Finally, you will have an opportunity to practice the skills and techniques learned.

### Topics Covered

- + Components of effective training
- + Sample training on CRM for Dynamics 365 for Sales users
- + Best practices and tips for training success
- + Planning and preparing for training
- + Facilitating CRM for Dynamics 365 training
- + Evaluating training

Audience: Business or IT professionals with responsibility for training. Recommended prerequisites are the CRM Boot Camp for Dynamics 365 or CRM Fast Track for Dynamics 365

Duration: 3 Days

## CRM Business Intelligence Wizard for Microsoft Dynamics 365

CRM for Dynamics 365 Online offers powerful reporting and analytics. This class will review all the unique CRM for Dynamics 365 reporting capabilities of Advanced Find views and charts, reports using the built-in report wizard, custom CRM for Dynamics 365 reports with FetchXML, and the Report Authoring Add-in. We will also do a deep dive into Power BI with the Power BI Desktop app. With this tool the report author can create stunning visualizations and analysis through interactive reports. These reports are published directly from the interface to the Power BI site for users to consume, create and share their own dashboards, and schedule refreshes. You will leave with all the necessary knowledge and resources to create powerful analytics from your CRM for Dynamics 365 system .

Note: some content in this class applies exclusively to CRM for Dynamics 365 Online and On-premise. The instructor will indicate those differences in class.

### Topics Covered

- + Advanced Find Views
- + Charts and Dashboards
- + Report Wizard Reports
- + PowerBI Suite including
  - PowerView
  - PowerMap
  - PowerQuery
  - PowerPivot
- + Report Authoring with SSRS

Audience: Intermediate or advanced technical. Knowledge of Microsoft Dynamics CRM basic functionality is recommended. Experience with Microsoft SQL Database is helpful but not required.

Duration: 3 Days

## CRM Developer Fast Track for Dynamics 365

For technical people who say “Just show me how to extend CRM for Dynamics 365,” this is the whirlwind introduction you need. First, this course will discuss when and why you extend CRM for Dynamics 365 with custom code, and what various custom code options are supported through the Software Development Kit (SDK). Then, there will be a hands-on portion where you will learn how to create and deploy web resources, as well as create and deploy plugins within your CRM environment. Finally, this course will go over the nuances of creating CRM for Dynamics 365 reports and the integration options with CRM for Dynamics 365.

### Topics Covered

- + Extending CRM for Dynamics 365 Overview
- + Scripting and Web Resources
- + Extending CRM for Dynamics 365 with Plugins
- + Integration options
- + What’s different about CRM for Dynamics 365 Reports

Audience: Advanced technical. Experience with relational databases, SQL, SSRS, and light programming required. Understanding of basic CRM functionality and CRM customization knowledge required.

Duration: 3 Days

## CRM Advanced Processes for Microsoft Dynamics 365

After a quick review of the process basics, this course goes in-depth with numerous hands-on exercises that enable students to master workflows, dialogues, and process flows. This class will start with a simple workflow and move into working on advanced workflows with child workflows, and real-time workflows. Although no coding will be done in class, this course will briefly touch on how workflows can be extended with code. Dialogs will also be covered from basics to using workflows and child dialogs within a process. Lastly, you will leave understanding how to create and update process flow stages, categories, and steps and create processes that go across entities or branch at various stages.

### Topics Covered

- + Understanding Workflows
- + Wait conditions, Child Workflows, Real-time Workflows
- + Extending Workflows with code
- + Dialog basics
- + Leveraging workflow in dialogs
- + Child dialogs
- + Process Flow Stages, Categories, and Steps
- + Switching Processes
- + Cross-entity Processes
- + Branching Processes

Audience: Intermediate or advanced technical. Basic understanding of Microsoft Dynamics CRM functionality required. Strong understanding of relational databases required.

Duration: 2 Days



## CRM Advanced Developer Training for Dynamics 365

Now that you've developed a few plug-ins and written some JavaScript for CRM for Dynamics 365, you're probably ready to take the next step. This course will explore how you can more efficiently create, debug and test your plug-ins and custom workflows so you'll be able to work faster and ensure what you've developed will hold up to changes over time.

From the client side of things, learn to create and debug more advanced functionality by using HTML alongside REST and SOAP requests. Finally to tie everything together, topics like solution management, source control, and deployment will be covered.

### Topics Covered

- + Best Practices - .NET Development
- + Plugins & Workflows
- + Microsoft Azure
- + Best Practices - JavaScript Development
- + Working with Endpoints
- + Using HTML & JavaScript
- + Application Lifecycle Management

Audience: Advanced technical experience and understanding of how to extend CRM for Dynamics 365 with code. Recommended prerequisite are the CRM Fast Track for Dynamics 365 and the CRM Developer Fast Track for Dynamics 365 courses  
Duration: 2 Days

## Unified Service Desk (USD) Boot Camp

This course will provide technical resources a deep dive into USD. The Unified Service Desk was designed to allow for advanced applications to be created that will manage the agent desktop experience for CRM for Dynamics 365. It adds the ability to organize CRM for Dynamics 365 windows into Sessions to keep multiple customer interactions separated to improve data quality and agent manageability. It was also designed to allow an administrator to create a completely customized user experience including toolbars, agent scripting, overview information, alerts, menus, using only configuration done through CRM for Dynamics 365. It also allows the administrator to auto populate complete CRM for Dynamics 365 forms with data from other tabs or other applications. It includes a powerful rules engine for routing CRM for Dynamics 365 popup windows to specific tabs and controlling the behavior of the user experience.

### Topics Covered

- + Introduction and Overview
- + Installation
- + Actions, Action calls and Events
- + Toolbars and Window Navigation rules
- + Logging and Debugging
- + Scriptlets and Session Management
- + Using CRM data and entity searches
- + Agent Scripts
- + Templates, Styling, and Translation
- + CTI Framework
- + CCA Migration
- + Hosting External Applications
- + Troubleshooting

Audience: Technical architects, developers, and administrators with .NET experience and CRM for Dynamics 365 admin experience.

Duration: 3 Days

## Field Service Boot Camp

CRM for Dynamics 365 has continued to significantly enhance the Service functionality and specifically Field Service Management. In this three-day course, we will do a deep dive into CRM for Dynamics 365 Field Service. Through discussion, demo and hands-on labs in a CRM for Dynamics 365 environment you will learn how to set -up, plan, configure and deploy the Field Service functionality in your organization, including the robust scheduling engine and mobile capabilities for field service technicians.

**Audience:** CRM for Dynamics 365 Administrators or CRM for Dynamics 365 Power Users and SMEs looking to advance their knowledge or learn about Field Service functionality and capabilities in CRM for Dynamics 365.

### Topics Covered

- + Setup and general settings
- + Core Functionality
- + Data Exploration
- + Reporting and Analytics
- + Mobile
- + Case Studies

Duration: 3 Days

## Project Service Boot Camp

The Project Service Automation (PSA) functionality provides a complete solution to plan and deliver billable projects to your customers. In this course you will get a jump start to your project implementation with a deep dive of the setup, configuration, and management of projects, resources, expenses, and much more through lecture, hands-on-labs, and real-world scenarios. By leveraging PSA, your organization will be able to estimate, quote, and contract work. You will also be able to efficiently plan and assign resources, enable team collaboration, and capture time, expense, and progress data for real-time insights and accurate invoicing.

**Audience:** CRM for Dynamics 365 Administrators, Project and Resource Managers, and SME's interested in the functionality, capabilities, and implementation steps required of Project Service Automation for CRM

Duration: 3 Days

### Topics Covered

- + Project Management Automation Overview
- + Initial Configuration and Setup
- + Resources
- + Managing the Sales Process
- + Account Management
- + Project Prerequisites
- + Time, Expenses, and Collaboration
- + Tracking Project Progress and Cost Consumption

## Adxstudio Portals

Adxstudio Portal is a web portal solution that extends CRM for Dynamics 365 for various industries and organizations' client needs. Features include rich content publishing capabilities for various platforms, including mobile devices, in a secured environment. In this course learn how to install, configure and manage your portal and CRM integration.

### Topics Covered

- + Overview of Portals
- + Content Management
- + Configuration and Styling
- + Security
- + Web Forms
- + LINQ Query Adapter
- + Installer Overview

Audience: CRM for Dynamics 365

Administrators, Content Authors and SMEs interested in portal functionality, configuration and implementation steps. Basic concepts of CRM for Dynamics 365 are not included in this course. A baseline knowledge and functionality of CRM is recommend prior to attending.

Duration: 2 Days

## Building A Training

When bringing CRM University for Dynamics 365 onsite to your location, individual courses may be selected from this á-la-cart menu to form a custom training. Training is priced into “days of training” by adding up the durations into full days.

Steps:

1. Select the individual courses you want
2. Add up the duration to understand the total # of days (8 hours each) of training you need
3. See page 17 for the cost per day of training

### Introduction to CRM for Microsoft Dynamics 365

100

For those who have never worked with CRM for Dynamics 365 before, this course helps participants understand the built-in functionality. Participants will learn how to access CRM and the differences in the interfaces of CRM via the web, outlook, and mobile. After surveying the sales, marketing, and service processes in the application, participants will learn the basic navigation of the application, including how to search and view records, add activities and notes, and how to set personal options.

Audience: Beginner Duration: 2 Hours

### Sales Lead to Opportunity Processes

10

Understand how CRM for Dynamics 365 supports the sales process from Lead through the close of an Opportunity. Participants will learn the business rules built into CRM and how the sales process is often automated. In this course, sales analytics will be briefly discussed in the context of what sales, including reporting on the opportunity pipeline and goal management.

Audience: Beginner Duration: 4 Hours

### Sales to Quote to Order Processes

102

Advanced use of the sales features in CRM for Dynamics 365 involves setting up the product catalog and utilizing it for the forecasting of opportunities, creating quotes, orders, and invoices. This involves the discussion of product pricelists and discount rules as well as the common functions of the integration with ERP.

Audience: Beginner Duration: 4 Hours

### Marketing

103

Learn how to use the marketing functionality in CRM for Dynamics 365 which includes marketing lists, quick campaigns, campaigns, campaign responses, email templates, and importing leads. You will examine the benefits of closed loop marketing and learn how to track the success and effectiveness of your marketing campaigns.

Audience: Intermediate Duration: 4 Hours

## Service

104

Gain an understanding of the service management capabilities of CRM for Dynamics 365. Learn how to track customer issues, complaints, questions or requests in the cases entity. Understand how using the subject tree and articles can help with organizing and resolving cases. This course will cover advanced uses of service such as SLAs, entitlements and queues.

Audience: Beginner Duration: 4 Hours

## Searching and Reporting

200

This course will show you how to use and optimize the quick find, and how to pull advanced find queries. In addition, you will learn how to save advanced find queries as personal views and export advanced find results to excel. You'll gain an understanding of out-of-the-box reports and how to use the report wizard to create custom CRM reports.

Note: this course will not cover more advanced topics such as custom reporting using SQL, SSRS or Fetch XML.

Audience: Intermediate Duration: 4 Hours

## Templates

201

This course will cover the basics of how and when to use templates. You'll learn how to set up and use email templates, mail merge templates, article templates, and contract templates.

Audience: Intermediate Duration: 2 Hours

## Data Management

202

In this course you will learn how to set up and use duplicate detection; including duplicate detection settings, duplicate detection rules, and duplicate detection jobs. The CRM for Dynamics 365 import wizard will also be covered. Note: this training will not cover other importing tools, such as Scribe.

Audience: Advanced users; specifically system customizers or system administrators.

Duration: 2 Hours

## Workflows

300

Learn about the benefits of using workflows. Discover how to create on demand, real-time, and child workflows. Gain an understanding of the required steps in order to perform a successful business process analysis. This course will also include some common scenarios when workflows are useful to use. It will bridge into advanced workflow scenarios to give you the breadth of what workflows can do.

Audience: Intermediate to advanced users; specifically CRM for Dynamics 365 power users, system customizers or system administrators. Duration: 4 Hours

## Dialogs

301

A common misperception is that dialogs are only useful in call center scenarios. While they can be helpful in call centers there are many other uses as well! Learn how to standardize procedures and utilize dialogs. This course will show you how to create dialogs and will cover specific examples of when they are helpful. It will take you from basic use of dialogs into how to incorporate workflows into dialogs and create child dialogs.

Audience: Intermediate to advanced users; specifically CRM for Dynamics 365 power users, system customizers or system administrators. Duration: 4 Hours

## Process Flows

302

Understand how Business Process flows work, best practices for creating process flows, and how to create process flows for your organization. This course will discuss how to modify existing process flows, deactivate unused process flows, associate process flows with security roles, and how to roll out and implement process flows. Advanced processes such as branching processes and processes that go across entities will also be discussed.

Audience: Intermediate users; specifically CRM for Dynamics 365 power users, system customizers or system administrators. Duration: 4 Hours

## Administration

400

Learn about CRM for Dynamics 365 administration. This course will give you an understanding of the different duties of an Administrator such as adding users, setting up teams and using security roles. It'll also cover system settings.

Audience: Advanced users; specifically system customizers or system administrators.  
Duration: 2 Hours

## Customization

401

Advance your knowledge on how to customize in CRM for Dynamics 365 using out-of-the-box customization tools. This course will teach how you to customize views, fields, forms, and entities. Discover how to impact the way the users experience CRM with role-based forms, sub-grids, business rules, quick view forms, and quick create forms. Note: this course does not cover topics such as plugins, web resources or JavaScript.

Audience: Advanced users; specifically system customizers or system administrators.

Duration: 1 Day

## Marketing PowerPacks

521

Learn how you can enhance the out-of-the-box marketing functionality of CRM for Dynamics 365 with the PowerPack Marketing add-ons. Dive into how PowerMailChimp, PowerEmail, PowerWebForm, PowerWebTraffic, PowerSurvey, PowerSocial, PowerScore, and PowerSMS work. Hands-on labs will give participants firsthand experience implementing these solutions while learning about the robust functionality that these solutions have to offer.

Prerequisites: BC100, BC103, BC200, BC201 (or Boot Camp) and MA100 Audience: Intermediate  
Duration: 1 Day

## Service Deep Dive

530

In this course we will do a deep dive into the features for customer service including advanced features on cases, hierarchies, parent-child relationships, case merging, and auto-case creation. This course will also cover how to implement Entitlements & SLAs, Queues, and Routing Rules. You will get a brief overview of how other customer service solutions such as Microsoft Parature and Unified Service Desk (USD) augment or integrate with the built-in services features of CRM for Dynamics 365.

Audience: Intermediate technical. Understanding of Microsoft Dynamics CRM navigation required. Understanding of customer service teams and processes required. Duration: 1 Day



## Excel and CRM for Dynamics 365

600

Many organizations have users with extensive Microsoft Excel skills. That knowledge can be leveraged to create powerful analytics and stunning visualizations. In this course, we use labs and examples to explore how to feed CRM data into Excel, as well as many other data sources for deep insights into your environment. This course covers Power View, Power- Pivot, Power Query, and Power Map. Some functionality of these tools is only available to customers using CRM for Dynamics 365 Online.

Audience: Intermediate with CRM 2011 administration experience required. Duration: 4 hours

## What's Different about CRM for Dynamics 365 Reports?

610

This course covers the nuances of reporting with CRM for Dynamics 365 for experienced report writers. CRM reporting has several unique and robust features that enable a rich report-consumer experience. In this class, we will explore those hidden gems and how to leverage them within your organization.

Audience: Intermediate or advanced technical. Knowledge of CRM for Dynamics 365 basic functionality is recommended. Experience with Microsoft SQL Database is helpful but not required.

Duration: 2 hours

## Introduction to Sequel Server Reporting Services (SSRS)

611

Introduction to SSRS with CRM for Dynamics 365

New to SQL Server Reporting Services? Or need a deep dive into CRM for Dynamics 365 reporting? This course is full of hands-on-labs, demonstrations, and sample reports to get you started and confident in your CRM SRS report writing.

Audience: Beginner or intermediate technical. Knowledge of CRM for Dynamics 365 basic functionality is recommended. Experience with Microsoft SQL Database is helpful but not required. Duration: 4 hours

## Advanced Sequel Server Reporting Services (SSRS)

612

Advanced SSRS with CRM for Dynamics 365

Need to take your Microsoft SQL Reporting Services report authoring skills to the next level? This class will be a deep dive into SQL and FetchXML reporting required to support your report consumers.

Audience: Intermediate or advanced technical. Knowledge of CRM for Dynamics 365 basic functionality is required. Experience with Microsoft SQL Database is helpful but not required. Duration: 4 hours

## PowerBI and CRM for Dynamics 365

613

Microsoft Power BI provides a robust suite of capabilities of data analysis, visualization, and self-service enabling us to deliver reporting and analytics of not only CRM for Dynamics 365 data but also a myriad of other data sources. But where to start? Whether you are On-Premise, in the Cloud, or a complex hybrid, this session will wade through the technical requirements, administrative setup, capabilities, gateways, and how to use which tool to use where. We will do a deep dive into the Power BI Desktop tool and leveraging the PowerBI.com Dashboard functionality, the tablet apps, as well as the Excel Power BI add-ons.

Audience: Intermediate Technical. Knowledge of CRM for Dynamics 365 architecture recommended. Experience with CRM reporting and analytics

Duration: 1 Day

## Infrastructure and Installation

700

Understand the core components of the CRM for Dynamics 365 installation, including the CRM Server, Email Routing and Server-side Sync, and Outlook client. Discuss at a high-level the server infrastructure administration, such as capacity planning, benchmark tests, performance monitoring, and maintenance.

Audience: Advanced technical knowledge required in the area of server administration.

Duration: 1 Day

## Administration of CRM for Dynamics 365 Online

701

CRM for Dynamics 365 Online Administration continues to be more complex as the suite of products becomes more robust and integrated. In this course, we will dig into the options and features of CRM for Dynamics 365 Online administration leveraging the sandbox functionality for training and testing. This class will demystify the setup and delivery of the Power BI suite from an administrator's perspective and will cover how these powerful reports are deployed to your CRM and SharePoint environments. Other topics will include options for Data Replication and integration to local resources for further analysis, SharePoint integration, and Onedrive.

Audience: Intermediate or advanced technical. Knowledge of Microsoft Dynamics CRM basic functionality is required. Duration: 1 Day

## Integration Options

800

This course gives a high-level overview of the integration options with CRM for Dynamics 365 including External System to CRM, CRM to External System, event-driven integrations, and workflow-driven integrations.

Audience: Advanced technical helpful. Duration: 2 hours

## Introduction to SQL Server Integration Services (SSIS)

801

By attending this course, participants will understand the basic concepts of integration, how SSIS can be used to do data migrations and build integrations. This course is designed for participants that have no experience with SSIS. It is aimed at helping students get the basics of SSIS and to see something in action. Participants will get hands on experience

Audience: Intermediate or advanced technical. Knowledge of CRM for Dynamics 365 basic functionality is required. Duration: 2 Days

## Introduction to Scribe

802

By attending this course, participants will understand the basic concepts of integration, how Scribe can be used to do data migrations and build integrations. We will also cover when Scribe can be used as a solution and when there are other ways to build integrations.

Audience: Intermediate or advanced technical. Knowledge of CRM for Dynamics 365 basic functionality is required. Experience with Microsoft SQL Database is helpful but not required. Duration: 1 Day

## Extending CRM for Dynamics 365 Overview

900

Understand the xRM application framework, the platform layers, security model, and business logic. Learn common platform operations such as WCF, discovery service, and classes. Understand authentication, authorization, querying data, and executing operations.

Audience: Advanced technical ability required. Experience with custom development is needed. Duration: 1 Day

## Extending CRM for Dynamics 365 with Plugins

901

After an overview of plug-ins, this course covers the event framework, plug-in isolation, trusts and statistics, how to develop plugins, impersonation with plugins, and entity classes. Participants will complete a lab where they create, register, deploy, and debug a plugin.

Learn how to create custom workflow activities.

Audience: Advanced technical ability required. Experience with custom development is needed. Duration: 4 hours

## Scripting and Web Resources

902

Understand application event programming using JavaScript libraries, form, and field events. Complete labs on controlling tab visibility, modifying the sitemap, and customizing the ribbon. Learn how to create and deploy web resources, including JavaScript, Silver- light, and JQuery.

Audience: Advanced technical ability required. Experience with custom development is needed. Duration: 1 Day

## Attend a Training vs. Build a Training

If your organization needs training in CRM, there are two options. You can attend a CRM University for Dynamics 365 training provided by PowerObjects, or you can bring a trainer onsite at your location. This matrix is designed to help you decide which option is right for you.

Considerations	Attend a Training	Build a Training
Cost of 1 day of Training	\$500 + travel	\$3300*
For 3 People	\$1500 + travel	\$3300* + travel for 1
For 5 People	\$2500 + travel	\$3300* + travel for 1
For 10 People	\$5000 + travel	\$3300* + travel for 1
Refreshments & Lunches Provided	Yes	No - Generally your organization brings food or specifies location of these
Control the Agenda	No	Custom Agenda In addition to selecting the course you want delivered, you may work with your trainer to emphasize or deemphasize content.
Vary the Participants per topic	No	Yes Agenda may specify times so some team members can participate in certain parts of the training.
Discuss your business cases	Minimal	Yes
Get out of the Office	Yes	No

\* To bring a CRM for Dynamics 365 trainer to your location, rates are \$3300 (\$4300 CAD) per day for customers and \$4000 (\$5200 CAD) per day for non-customers plus travel expenses.