



DATA SHEET

Dynamics CRM Online 4.0 Workshop

Guiding you through the CRM Online Application

How the Offering Works

The Microsoft Dynamics CRM Online Workshop is a two day course for Dynamics CRM Online customers that provides a thorough review of the features available in the CRM Online application. Attendees will be given instruction on how to successfully use and navigate through the CRM system.

Gain a deeper understanding of the CRM Online application through a comprehensive workshop delivered by Microsoft CRM experts.

Core Focus of the Workshop

This course is designed for CRM administrators and end-users. The focus of the course will be to:

- Provide the necessary CRM Online application training. Understanding the different features of the CRM Online application and learning how to use them is key to an effective experience.
- The workshop will also cover more technical topics such as: customization, workflow, security, and data management.

Target Audience

- This is a 200+ level service with the target audience being:
 - CRM Administrators and Customizers
 - CRM End-Users

Workshop Highlights:

- Deeper understanding of the CRM application
- Dedicated time with CRM expert
- Best practices gained from past CRM experiences
- Valuable CRM administrator topics covered

Workshop Agenda

Day 1: Application Overview

- Sales Module
- Marketing Module (including Internet Marketing)
- Service Module
- Chart Dashboards
- CRM Outlook Clients
- Advanced Find

(Lab exercises also included)

Day 2: Customization and Advanced Topics

- Customizations
- Reports
- Workflows
- Security
- Data Management
 - Data Import
 - Data Cleanup
 - Duplicate Detection
- E-Mail Router
- SDK Overview

(Lab exercises also included)

Important Details:

- While the course is listed as a two day course with one day of application training and one day of customization and advanced training, there is flexibility to spend more time in the specific areas of interest of the attendees.
- The training will be delivered at the customer site, unless other arrangements are agreed upon.

Maximize the Value of Your CRM Investment

The mission of Microsoft Services is to help you get the most out of your Microsoft investments. Whether you are looking to improve your bottom line, enhance productivity, or use technology to realize new business opportunities, Microsoft is ready to assist. From business support to strategic consulting, we offer a full range of Premier Support services for any stage in your IT lifecycle.

For more information about proactive Microsoft Dynamics services, contact your local Premier Services lead.

Enhance the overall productivity of your CRM administrators and users by taking advantage of the workshop.

For more information

Please visit the Premier Support Web site at www.microsoft.com/premier or contact your local Microsoft Services representative.