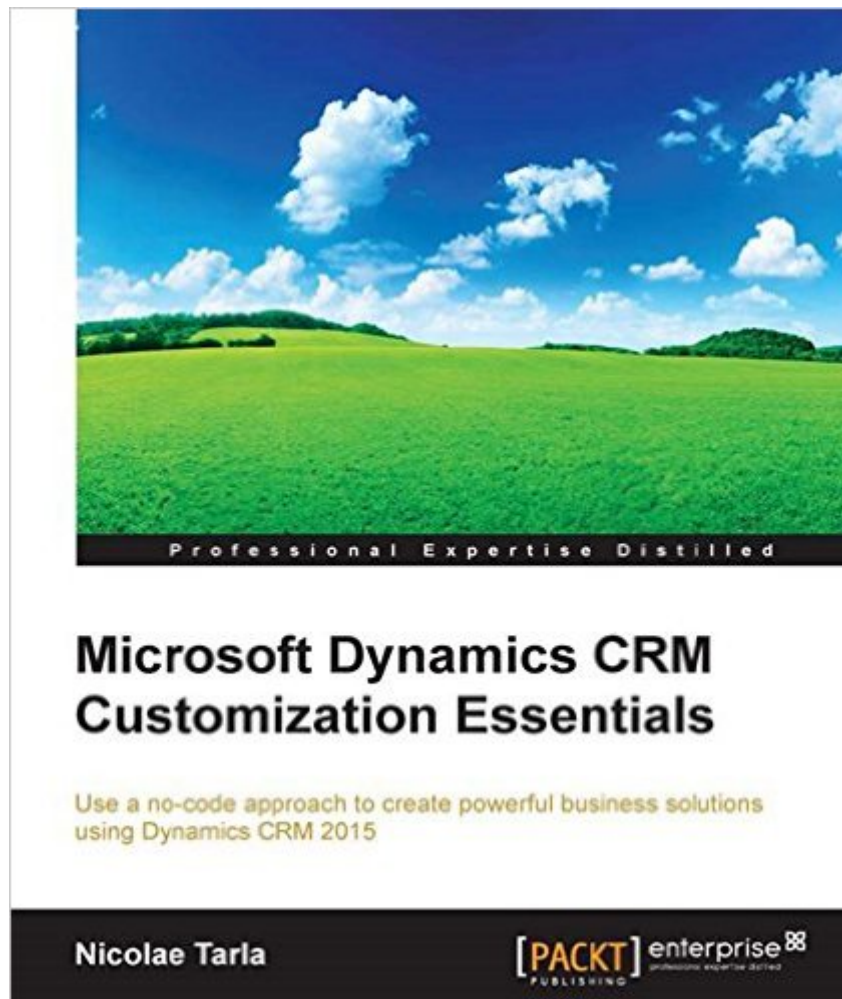


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# Microsoft Dynamics CRM Customization Essentials (Professional Expertise Distilled)



## Synopsis

Use a no-code approach to create powerful business solutions using Dynamics CRM 2015

**About This Book** Master the skills necessary to customize your system using the wizard driven capabilities of Dynamics CRM platform Use Business rules and flows to enforce and visually enhance the user experience A no-code approach to speed up the full range of Dynamics CRM features

**Who This Book Is For** If you are new to Dynamics CRM or a seasoned user looking to enhance your knowledge of the platform, then this book is for you. It is also for skilled developers who are looking to move to the Microsoft stack to build business solution software.

**What You Will Learn** Configure Outlook to integrate with your Dynamics CRM Online instance Manage the existing application structure by understanding how to extend and/or modify the modules and update the navigation Learn how to use different entity views in order to get a 360-degree view of customer data Map modern business processes to the platform to enhance user experience Use different Dynamics CRM processes such as dialogs, workflows, actions, and business process workflows Use internal and external social data to enhance the user's ability to make the right decisions Dive into generic administration options such as managing configuration and customization to become a power user

**In Detail** Dynamics CRM is Microsoft's answer to customer relationship management. The platform's flexibility allows system customizers to enhance its functionality to map any kind of business and scale to any size. Through this practical guide, you will develop a vital and holistic understanding of the key features of Dynamics CRM. You will work with entities within the existing modules, learn how to customize and extend entities, and explore how to create logical relationships between them. You will also look at business rules and business process flows and learn how to use these features to enforce and visually enhance user experience. Furthermore, you will customize business entities without using code and cover the new features in Dynamics CRM. By the end of the book, you will have acquired new marketable skills in developing software for businesses running Dynamics CRM.

## Book Information

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## Customer Reviews

"Microsoft Dynamics CRM Customization Essentials" written by Nicolae Tarla, a MVP alumni. This book has published on December 2014, targeting to Microsoft Dynamics CRM 2015. But in my option, most of the contents in this book can also apply to CRM 2011 and 2013. The bright spot of this book is about "Use a no-code approach to create powerful business solutions using Dynamics CRM 2015". Therefore the audience of this book are business administration users, functional consultant etc. Developers could also benefit from this book by recognising what are the out-of-box Microsoft Dynamics CRM offerings, and how to leverage them; rather than try to develop everything " noted in most scenarios, we should follow the "CCDI" route: Configuration -> Customisation -> Development -> Integration. In some scenarios, the right route would be CCID - so use the best of CRM, not everything (in which other technology/products can provide a better solution, so integration would be preferable and scalable). Either way, "CC" are always the first choices, which are the focus of this book; it has 6 chapters: Chapter 1: Getting Started " get a free trial of CRM Online and configure CRM Outlook. Chapter 2: Dynamics CRM Application Structure " CRM modules and major components. Chapter 3: Customizing Entities " Entities in detail, customise entities and extend the system. Chapter 4: Business Processes " Customise business processes and business roles. Chapter 5: Social Features in Microsoft Dynamics CRM " various social platforms, internally and externally of Dynamics CRM platform. Chapter 6: Dynamics CRM Administration " Various administration options available in Dynamics CRM.

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