



COMPUTER TRAINING

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CRM

Course No. 80141

1 Day

Target Audience:

This course teaches students the basic skills required to create integrated applications that utilize data and features from both Microsoft Dynamics CRM 4.0 and Microsoft Office SharePoint Server 2007. It is intended for business analysts and solution designers, power-users and customizers and .NET developers who need an introduction to Dynamics CRM and SharePoint integration techniques.

Pre-requisites:

Before attending this course, students must have the following pre-requisites:

- Attended Course 8913, or have equivalent experience.
- Be familiar with basic use of SharePoint sites, lists and document libraries.
- Have some familiarity with basic customization techniques in either Microsoft Dynamics CRM 4.0 or SharePoint.

Purpose:

After completing the course, students will be able to understand the kinds of business problems SharePoint and Microsoft Dynamics CRM are designed to solve; learn Microsoft Dynamics CRM customization techniques required to build integrated applications; learn how to use a static or dynamic URL for a Microsoft Dynamics CRM record to display associated content in SharePoint; work with SharePoint Web Parts and Pages; use the List Web Part for Microsoft Dynamics CRM 4.0; use SharePoint Designer Data Views to expose Microsoft Dynamics CRM 4.0 data; use the Business Data Catalog with data from Microsoft Dynamics CRM 4.0 Filtered Views; configure, publish, and view Excel spreadsheets; overview the Web Parts available for the Business Data Catalog and Excel Services; understand the basics of calling the Dynamics CRM 4.0 Web Services from a SharePoint ASP.NET page.

Integrating Microsoft Dynamics CRM 4.0 and Microsoft Office SharePoint Server 2007

At the end of the course the delegate will be able to complete the following:

Introduction and Overview

- This module discusses which scenarios are best suited for each platform, what the comparative strengths of each are in different application scenarios, and how to build applications that integrate features from both SharePoint and Microsoft Dynamics CRM 4.0.
- The Right Tool for the Job
- Common Integration Scenarios

Skills:

- Understand basic positioning of SharePoint and Microsoft Dynamics CRM, and the kinds of business problems each is designed to solve.
- Identify the most common scenarios where SharePoint and Dynamics CRM can be used together.

Extending Microsoft Dynamics CRM 4.0 with data from SharePoint

- This module teaches basic Microsoft Dynamics CRM 4.0 customization concepts and skills, and focuses on extending the highly structured data characteristic of Microsoft Dynamics CRM with related but less structured data often stored in SharePoint.
- Microsoft Dynamics CRM 4.0 Customization Basics
- Extending Microsoft Dynamics CRM Using IFRAMES with Static URLs
- Extending Microsoft Dynamics CRM Using IFRAMES with Dynamic URLs
- Lab: Search for SharePoint for Information related to a Microsoft Dynamics CRM 4.0 Account Record.

Skills:

- Learn basic Microsoft Dynamics CRM 4.0 customization techniques required to build integrated applications.
- Learn how to use a static URL for a Microsoft Dynamics CRM 4.0 record to display associated content stored in SharePoint.
- Learn how to construct a URL dynamically, based on information contained in a Microsoft Dynamics CRM 4.0 record, and display associated content stored in SharePoint.

Consume Microsoft Dynamics CRM 4.0 Data from Windows SharePoint Services 3.0

- This module introduces Windows SharePoint Services 3.0 (WSS) customization features which can be used to expose Microsoft Dynamics CRM 4.0 data in WSS.
- Understanding and Working with SharePoint Web Parts and Pages
- Understanding and Using the List Web Part for Microsoft Dynamics CRM 4.0

- Understanding and Using SharePoint Designer Data Views to Expose Microsoft Dynamics CRM 4.0 Data
- Lab: Working with the Microsoft Dynamics CRM 4.0 List View Web Part

Skills:

- Understand the Concept of WSS Web Part Pages and Web Parts.
- Be introduced to the SharePoint List View Web Parts for Microsoft Dynamics CRM 4.0.
- Understand and use SharePoint Designer to create Data Views that Access Dynamics CRM 4.0 Data.

Building Data-Aware Applications Using Microsoft Office SharePoint Server 2007

- This module explains Microsoft Office SharePoint Server 2007 features that can integrate with Microsoft Dynamics CRM 4.0, focusing on the Business Data Catalog and Excel Services.
- Understanding and Using the Business Data Catalog with Microsoft Dynamics CRM 4.0.
- Understanding and Using Excel Services
- Building a MOSS 2007 Dashboard using Microsoft Dynamics CRM 4.0 Data

Skills:

- Understand how to use the Business Data Catalog with data From Microsoft Dynamics CRM 4.0 Filtered Views.
- Understand how to configure, publish and view Excel spreadsheets using Excel Services.
- Overview the Web Parts available for the Business Data Catalog and Excel Services to allow views of Microsoft Dynamics CRM 4.0 data to be accessible on a SharePoint dashboard.

Advanced Integration Scenarios

- This chapter introduces several advanced integration scenarios for Microsoft Dynamics CRM 4.0 and Windows SharePoint Services integration.
- Building a Basic Web-to-Lead ASP.NET Page
- Lab: Building a Web-to-Lead Application

Skills:

- Understand the basics of calling the Dynamics CRM 4.0 Web Services from a SharePoint ASP.NET page.



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Numbers:

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