



Microsoft Dynamics CRM 2016 Online Deployment (MB2-710)

In association with : **Silver
Microsoft
Partner**



Implement a Microsoft Dynamics CRM Online deployment

Access Microsoft Dynamics CRM Online

- Describe methods for accessing Microsoft Dynamics CRM Online; identify supported browsers; identify supported phone operating systems; describe requirements for Dynamics CRM for tablets; identify supported web browsers; identify user subscription licence types; describe subscription add-ons

Plan a deployment

- Identify the storage requirements; plan security; determine the number of instances and licences that are required; identify implications of implementing single sign-on

Import data

- Compare the methods for importing data; import data by using the Import Data Wizard; identify limitations of import processes

Customize Microsoft Dynamics CRM Online

- Create new fields; modify values for option sets; modify entity forms; create new entities and reports; modify views and dashboards

Configure Microsoft Dynamics CRM Online

Configure subscriptions

- Identify methods to sign-up for a subscription; identify subscription requirements; describe the subscription cancellation process; describe the methods for purchasing add-ons

Manage users

- Identify the methods to add users to Dynamics CRM Online; assign Microsoft Dynamics CRM Online licences to users; assign security roles; enable and disable users; describe non-interactive users; mark a user as non-interactive; identify administrative roles

Synchronise user accounts

- Compare Dynamics CRM Online accounts with company accounts; describe user synchronisation; identify the steps to synchronise Active Directory with Office 365; describe Active Directory Federation Services

Manage Microsoft Dynamics CRM Online

Administer Microsoft Dynamics CRM Online instances

- Define instances; describe the relationship between instances subscriptions, tenants and security groups; describe instance types; set instance properties; switch an instance; reset an instance; place an instance in administrative mode; delete an instance; describe methods to copy an instance; create a copy of an instance

Describe tenant considerations

- Identify limitations on the number and type of instances per tenant; configure the region for a tenant; describe limitation and requirements for multiple tenants

Manage storage and administrative notifications

- Identify the storage limit for a subscription; describe the implications of reaching the storage limit; view resources used; identify requirements and limitations for sending administrative notifications

Describe the Microsoft Dynamics CRM Online update policy

- Identify the frequency of updates; describe the update process; determine the version of Microsoft Dynamics CRM Online; skip updates; approve updates; determine what updates are available; reschedule an update

Manage related services

Describe related services

- Identify related online services; integrate Microsoft Social Engagement with Microsoft Dynamics CRM Online; manage campaigns with Microsoft Dynamics Marketing

Integrate Yammer and SharePoint Online

- Describe Yammer and SharePoint Online; identify SharePoint Online integration types; describe the integration process

Integrate OneNote, Skype, Skype for Business, Office 365 Groups, and OneDrive for Business

- Compare Dynamics CRM Notes and OneNote; identify storage location for OneNote notebooks; configure OneNote integration; integrate Skype and Skype for Business; identify limitations for Skype and Skype for Business; describe Office 365 Groups; identify requirements for Office 365 Groups; integrate Office 365 Groups with Microsoft Dynamics CRM Online

Manage mobile device apps

Install and use mobile device apps

- Identify the mobile apps for phones and tablets; describe requirements for mobile apps; identify supported mobile device hardware and software; install mobile apps; configure security privileges; describe restrictions for working offline; create draft records

Configure entities for mobile

- Identify entity types that can be accessed from mobile apps; hide form components; enable dashboards for mobile apps

Implement Microsoft Dynamics CRM for Microsoft Office Outlook

Deploy Dynamics CRM for Outlook

- Identify supported operating systems; describe required software components; compare Dynamics CRM for Outlook versions; identify deployment methods; configure Dynamics CRM for Outlook; configure multiple organisations

Configure offline capabilities

- Describe offline capabilities; identify fields that can be synchronised; describe limitations for synchronised fields; configure synchronised fields

Manage email

Select an email processing option

- Identify email processing options; describe the advantages of each email processing option; identify limitations and requirements for each email processing option

Track and correlate email

- Compare email tracking with email correlation; describe user options for automatic tracking; describe correlation options; identify limitations of folder-level tracking; configure folder-level tracking for Exchange folders

Manage mailbox records and email

- Describe synchronisation methods for incoming and outgoing email; configure the default synchronisation method for users and queues; describe mailbox records; configure approval for email addresses

Manage server-side synchronisation

Configure server-side synchronisation

- Describe server-side synchronisation; identify server-side synchronisation features and supported configurations; set the email processing method; configure mailbox records

Set up a forwarding mailbox

- Describe mailbox forwarding; create a forward mailbox record; add email forwarding rules for users; add mailbox records to server profile; enable mailboxes; test email configuration; describe synchronisation alerts; view the Performance Dashboard



Thank You

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