Microsoft Dynamics CRM 2016 Customization - Second Edition

By Nicolae Tarla

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Key Features

- Latest guide on customizing your system using various features in Dynamics CRM 2016;
- Highly practical, example-rich guide that gives you power to bend Dynamics CRM to maximize profits in your organization;
- A no-code guide that is easy to follow for even non-programmers

Book Description

Microsoft Dynamics CRM is a Microsoft solution to satisfy the various needs of customer relationship management and is already equipped to be flexible to meet the needs of businesses. With Microsoft Dynamics CRM 2016, many new features were added for social, marketing, sales, and integration with other tools. These features add many dimensions to customization.

This book will not only showcase how CRM can be customized, but will also be your guide on how the latest advancements in Dynamics CRM 2016 can be used to benefit your business.

You will learn how to enhance the functionality of Microsoft Dynamics CRM 2016 and use it to serve different businesses of various scales. You will see how to get ready to customize CRM and then quickly move on to grasp the CRM app structure, which will help you customize Dynamics CRM better. You will find out how to customize CRM for sales, service, marketing, and social. We'll also show you how CRM 2016 can be seamlessly embedded into various productivity tools, and how to customize CRM for machine learning and contextual guidance. Finally, we'll also cover the latest advancements in CRM's mobile capabilities and its complete offline support so you can better customize it.

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
- Find out 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 the 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

About the Author

Nicolae Tarla is a Microsoft Dynamics CRM consultant involved in solution architecture and technical presales. He has worked on various mid-size to enterprise-level Dynamics CRM and SharePoint implementations for both the private and public sectors. He has been delivering Microsoft Dynamics CRM solutions since version 3.0 of the product.

Nicolae was a technical reviewer on the book Microsoft Dynamics CRM 2011: Dashboards Cookbook, Packt Publishing, wrote Microsoft Dynamics CRM 2011: Scripting Cookbook as well as the previous edition of Microsoft Dynamics CRM Customization Essentials, Packt Publishing, and is an active blogger at http://www.thecrmwiz.com. He has also presented at various public events, including eXtreme CRM in 2014.

In 2014, Nicolae was awarded the Business Solutions MVP title for his Dynamics CRM contributions.

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6. Dynamics CRM Administration

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