Course Outline

ADVANCEDTRAINING

Workflow in Microsoft Dynamics CRM 4.0

Introduction

This one-day instructor-led course describes how to create, run, and monitor workflows to automate business processes. The course emphasizes out-of-box workflow functionality. This course covers basic concepts, creating a basic workflow, the design process, updating triggers, conditional branching advanced and multi-stage workflows, monitoring workflows and workflow security.
The course also focuses on using workflows in Microsoft Dynamics CRM 4.0 to automate the sales process, lead promotion and probable revenue. Extending and upgrading workflows and data migration and workflows are not covered in detail in this course, but are introduced to provide students with insight into potential advanced workflow topics.

Pre-Requisites

Before attending this course, students must have:

- Experience using Microsoft Dynamics CRM 3.0 or 4.0.

In addition, it is reccomended, but not required, that students have completed:

- Course 8913: Applications in Microsoft Dynamics CRM 4.0.

Outcomes

At the completion of this course, participants will be able to:

- Describe the primary benefits and scenarios for using workflow in Microsoft Dynamics CRM.
- Describe how Microsoft Dynamics CRM 4.0 workflows function.
- Design, create, and manage basic workflows.

Course Details

Course Code: MS 80003
Duration: 1 day
Starting time: 9.00am
Finishing time: 4.30pm
Lunch and refreshments are provided.

Booking guidelines

Contact our Learning Consultants on 1300 86 87246 and we will assist you with your booking.

NATIONALLY RECOGNISED TRAINING
RTO No. 21932

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1300 TO TRAIN

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- **Module 1: Basic Workflows**

This module explains workflow concepts and how to create a basic workflow.

- **Lessons**
  - Introducing Workflows
  - Workflow Types and Triggers
  - Actions, Conditions, and Dynamic Values
  - Three Basic Workflows
- **Lab : Create an On-Demand Workflow**
  - Create a workflow
  - Add an e-mail activity
  - Publish a workflow

After completing this module, students will be able to:

- Describe what a workflow is and where they appear.
- Describe the basic concepts of workflow in Microsoft Dynamics CRM.
- Describe actions and conditions.
- Describe how basic workflows are created.

- **Module 2: Design Process**

This module presents a high-level overview of a typical design process for Microsoft Dynamics CRM workflows.

- **Lessons**
  - Design Considerations
  - Business Process Analysis
- **Lab : Identify and Chart Actions and Conditions**
  - Identify Actions and Conditions
  - Create a Flow Chart

After completing this module, students will be able to:

- Describe factors relevant to workflow planning and design.
- Describe how business process analysis relates to workflow design.

- **Module 3: Advanced Workflows**

This module explains how to create more advanced workflows, which can address the specific needs of businesses.

- **Lessons**
  - Update and Delete Triggers
  - Conditional Branching
  - An Advanced Workflow
- **Lab : Create an Audit Trail**
  - Create a Workflow
  - Add a Condition
  - Create an Audit Trail with Dynamic Values

After completing this module, students will be able to:

- Examine how update and delete triggers are used.
- Use conditional branching to specify multiple paths in a workflow.
- Create a workflow that uses advanced workflow features.

- **Module 4: Multi-Stage Workflows**

This module describes how to create multi-stage workflows. The concepts of stages and child workflows are introduced. In addition, the business benefits of staged and child workflows and how to plan them are presented.

- **Lessons**
  - Stages
  - A Set of Sales Process Workflows
  - Testing the Sales Process Workflows
- **Lab : Case Escalation**
  - Create a Child Workflow
  - Create the Parent Workflow
  - Create Stages
  - Add Steps

After completing this module, students will be able to:

- Describe and use stages.
- Create multi-stage and child workflows for a sales process.
- Describe considerations for testing a workflow.

- **Module 5: Managing Workflows**

This module describes how to manage workflows.

- **Lessons**
  - Monitoring Workflows
  - Importing and Exporting Workflows

- Workflow Security
- Data Migration and Workflows

Lab : Export and Import a Workflow

- Export a Workflow
- Delete the Workflow
- Import the Workflow

After completing this module, students will be able to:

- Describe how to monitor workflows.
- Describe how to import and export workflows.
- Describe how security settings affect workflows.
- Consider the effects of data migration on workflows.

Module 6: Additional Topics

This module describes additional scenarios for using workflows in Microsoft Dynamics CRM. It also provides information for developers who are interested in writing custom code to extend Microsoft Dynamics CRM to meet specific business needs.

Lessons

- More Scenarios
- Workflows and the Sales Pipeline Report
- Extending Workflows

After completing this module, students will be able to:

- Examine more ideas for using workflows.
- Describe how the Sales Pipeline report relates to workflows.
- Consider information about using custom assemblies to extend workflow functionality.