



Microsoft Dynamics CRM 2011 Cookbook

Dipankar Bhattacharya

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Includes over 75 incredible recipes for deploying, configuring, and customizing your CRM application

Overview

- Step-by-step guide to deploy Dynamics CRM 2011 components, configuring claim-based authentication and IFD deployment
- Focus on Dynamics CRM 2011 server maintenance and optimization techniques
- Learn advanced Dynamics CRM 2011 administration techniques
- Discover how to manage Dynamics CRM 2011 Solution, customize Ribbon and SiteMap, and integrate Microsoft SharePoint with CRM
- Implement business processes with workflows and dialogs

In Detail

Without a comprehensive understanding of deployment scenarios and steps, it is really difficult to install and maintain Dynamics CRM 2011 within complex IT infrastructures. Done badly, it can cause serious future maintenance and optimization issues.

Administration of CRM systems is equally complex and important; unless efficiently done, it can create fuss in the system and potentially bring down end user satisfaction. Configuration and customization of the system has to be done very carefully too so that it can meet the functional needs appropriately.

“Microsoft Dynamics CRM 2011 Cookbook” is a hands-on guide, providing clear, step-by-step instructions to deploy, maintain, optimize, and administer Dynamics CRM 2011 along with advanced configuration and customization processes, to give us a strong advantage in creating successful CRM applications.

This book introduces Dynamics CRM 2011 by describing the important aspects of the system. It will take you through a number of clear and practical recipes from successful deployment, hassle-free maintenance, and effective administration to advanced level configuration and customization techniques.

You will learn from a range of deployment and maintenance topics such as how to configure CRM to use claim-based authentication using AD FS, how to enable tracing in CRM servers, how to recover from server failures, and how to optimize server performance. This book will also discuss how to schedule Data Duplication detection jobs, enable auditing, export and import managed/unmanaged solutions, create 1:N, N:1, or N:N relationships between entities, configuring role based forms, adding a new button in the ribbon, SharePoint integration with CRM, and configuring a dialog or workflow.

You will learn everything you need to know, from deployment, administration, and maintenance to configuration, integration, and customization for your Dynamics CRM 2011 application.

What you will learn from this book

- Deploy Dynamics CRM 2011 on multi-server environment
- Internet Facing Deployment (IFD) of Dynamics CRM 2011

- Optimize Dynamics CRM 2011 Database Server Performance
- Create a Custom Administrator Security Role
- Configure system settings
- Schedule Data Duplication detection jobs
- Export Translations from an unmanaged solution
- Create a new 1-to-Many (1: N), Many-to-1 (N: 1), or Many-to-Many (N:N) relationship
- Configure a role based form
- Add a new ribbon button to an existing group of a specific entity
- Create Mail Merge templates using Microsoft Word
- Query CRM data in a dialog

Approach

This is a Cookbook with recipes aimed at all levels with lots of practical walkthroughs for virtualization techniques.

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