

# Pivotal CRM 6.0 Toolkit Customization Course (60200)

- Audience:** Pivotal CRM 6.0 Application customizers.
- Duration:** 5 days Instructor-led training
- Location:** CDC Software training locations or on Customer's premises
- Price:** \$3,000 per person for public classes and \$15,000 for onsite customer classes

**Prerequisites:**

- Completion of Pivotal CRM 6.0 Foundations course
- Solid understanding of Relational Databases

Experience with Windows Forms design using Visual Studio is recommended.

Description: The Pivotal 6.0 Foundations and Customization Boot Camp is a five day hands-on workshop for customizers, who are interested in learning how to tailor the Pivotal application to their Company's business processes. This class may also be of interest to System Analysts, Database Administrators and Power Users, who want to acquire more extensive and deep knowledge of Pivotal concepts. Each student receives a comprehensive Participant Guide that includes all topics covered by the instructor and sixty exercises that build on concepts taught in class.

**Note:** This course does not cover the migration from Pivotal 5.9 to 6.0.

## Course Overview

Students who attend this class will gain a solid understanding of how to perform major customization tasks using the Pivotal Toolkit, and how to create or modify Client Forms using Pivotal Form Designer in Visual Studio. Students will also learn how to customize Pivotal Portal Pages and Pivotal Integration for Microsoft Outlook. Taking this class provides students with thorough knowledge of the Pivotal CRM 6.0 architecture and database structure

The class includes hands-on exercises designed to step students through creating database tables, building user interface components and setting Pivotal CRM security on components they create. By the end of the class, students will have practiced the full customization process by testing their modifications to the Pivotal CRM Application and publishing them to a production system. Towards the end of the class, students will do a comprehensive project to demonstrate their knowledge of Pivotal customization tools.

## Course Agenda

### Day 1 – Pivotal Architecture

- Pivotal CRM - 3 Tier Architecture
- Pivotal CRM system architecture
- Pivotal CRM Environment Architecture
- The Pivotal system Relational Databases structure
- Pivotal Administration functions; Replicate, Restore, Apply Customization Changes
- Setting up the Customization Environment
- Creating Security groups for different job roles
- Adding users to security groups
- Creating View and Sync Filters

### Day 2 – Tables and Action Objects

- Creating and modifying existing Pivotal data types
- Designing and creating tables
- Creating field formulas
- Creating indexes
- Setting up object logging

- Using Pivotal Import Utility
- Using Pivotal Query Designer
- Creating Search Result Lists
- Enabling Full-Text Search
- Reports design with Pivotal and Crystal Reports
- Creating Letter Express templates

### **Day 3 – Pivotal Client Interface Customization**

- Creating Commands to display records, searches, reports
- Attaching Commands to the user interface elements
- Customizing Navigation model with Subjects, Topics, Task Pads, Task Groups and Tasks
- Creating Client Forms with Pivotal Form Designer
- Using Filters and Default Formulas
- Change fields values and form properties dynamically
- Creating Pivotal Portal Page using Microsoft SharePoint Services
- Adding and configuring Pivotal Search, Graph, RSS and URL Web Parts

### **Day 4 – Additional Customization Topics and Wrap-Up**

- Customizing Outlook Integration to link mail to the Pivotal database records
- Using a Table Mapping to create a custom Pivotal address book for Outlook
- Creating a Recipient Window to allow sending emails and link appointment to the record-related recipients
- Localizing Pivotal CRM systems for multi-language deployments
- Using the Toolkit Transporter to move database elements of from one Pivotal CRM system to another
- Publishing customization changes to the Master System of the Production Environment

### **Day 5 – Project**

- Put -it-together project to reinforce the knowledge acquired during the class