

Pivotal CRM 6.0 Foundations and Customization Boot Camp Course

Audience:	Pivotal CRM 6.0 Application customizers
Duration:	5 days
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:	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 class for customizers who are interested in learning how to tailor the Pivotal application to their company's business processes. Each student receives a comprehensive Participant Guide that includes all topics covered by the instructor along with hands-on exercises that build on concepts taught in class.

Note: This course does not cover the migration Pivotal CRM 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, Pivotal Form Designer in Visual Studio, Pivotal Portal Pages, and Pivotal Integration for Microsoft Outlook.

During this class students will learn about the key Platform and Application components of Pivotal CRM. They will explore the Pivotal Client interface working with functions available for end users. They will learn about the Pivotal CRM Architecture and the Customization Process. Students will work through hands-on exercises on customizing the application starting with designing database tables and continuing with building user interface components. At the end of the class students will have completed the full customization process by publishing their modifications into a production system. On the last day of the class, students will demonstrate their knowledge of the Pivotal CRM customization tools by performing additional exercises.

Course Agenda

Day 1 – Pivotal Foundations

- Key Platform and Application components of Pivotal CRM
- Pivotal Client navigation: Subjects, Topics and Portal Pages
- Pivotal Client Searching capabilities
- Static Lists
- Reports
- Letter express
- Outlook Integration
- Client Forms
- Pivotal CRM application business logic examples (applying Action Plans, managing Lead and Opportunities)
- Pivotal CRM application Help

Day 2 – Pivotal Architecture

- Pivotal CRM systems architecture (Business Module and Enterprise Database)
- The underlying structure of Relational Databases in Pivotal CRM systems
- Define the different Pivotal systems for customization, testing and production
- Pivotal CRM customization processes
- Setting up a Customization Environment
- Connecting to a License Server and assigning a license to the user



- Pivotal CRM Security groups and permissions
- Creating View and Sync Filters

Day 3 – Tables and Action Objects

- Pivotal CRM data types
- Designing and creating tables and indexes
- Field formulas
- Enabling object logging
- Applying structural changes to the Enterprise database of the Offline System
- Using Pivotal Import Utility
- Using Pivotal Query Designer
- Search Result Lists
- Enabling Full-Text Search
- Designing Pivotal CRM reports using Crystal Reports
- Creating Letter Express templates to merge database fields into Microsoft Word documents

Day 4 – Pivotal Client Interface Customization

- Creating Commands to display records, searches, reports
- Customize the navigation model with Subjects, Topics, Task Pads, Task Groups and Tasks
- Design Client Forms with Pivotal Form Editor using Groups, Tabs, Secondary, Web and Search Result Segments
- Adding Pivotal Dataset fields and Disconnected Fields to Client Forms
- Using Filters and Default Formulas
- Changing values of fields and properties of Pivotal Client forms dynamically
- Creating and customizing Portal pages using Microsoft SharePoint
- Adding and configuring Pivotal Search, Graph and URL Web Parts

Day 5 – Additional Customization Topics and Wrap-Up

- Customizing Pivotal CRM Integration for Microsoft Outlook
- Localizing the system for multi-language deployment
- Transporting elements of the Business Object database from one Pivotal system to another
- Complete the project by promoting the customization changes into Master System of the Production Environment
- Complete additional exercises to reinforce the acquired knowledge and discuss the results