Microsoft Dynamics 365 CRM Technical Administration, Customization and Extensibility

Course Description:

This course provides comprehensive coverage of Microsoft Dynamics 365 CRM customization and development. Participants will explore key concepts such as security configuration, entity management, form and view customization, and workflow automation. Additionally, the course introduces solutions for integrating web services and managing components in a solution. By the end of the course, participants will have gained the skills needed to configure, extend, and administer Microsoft Dynamics 365 CRM.

Audience Profile:

This course is designed for:

- Dynamics 365 administrators and developers responsible for configuring and customizing CRM environments.

- Solution architects and consultants who implement and manage Dynamics 365 CRM solutions.

- IT professionals seeking to understand the customization and integration options within Dynamics 365 CRM.

Prerequisites:

- A basic understanding of Microsoft Dynamics 365 CRM or similar CRM systems.

- Familiarity with fundamental CRM concepts such as entities, relationships, and workflows.

- Experience with IT systems administration and database management is beneficial.

Course Objectives:

Upon completion of this course, participants will be able to:

- Set up and configure Dynamics 365 CRM, including security roles, users, and teams.

- Create and manage custom entities and fields.

- Customize forms, views, charts, and dashboards.

- Design and implement workflows, business process flows, and custom actions.

- Extend the CRM user experience with client-side scripting and business rules.

- Integrate Dynamics 365 CRM with web services and APIs.

- Manage solutions, including importing and exporting components.

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- Configure security roles, users, and teams
- Lab: Configure users, business units, and access levels

Module 3: Creating and Managing Entities

- Introduction to entity types and custom entities
- Managing entity properties and security
- Lab: Configure access teams and management hierarchy

Module 4: Customizing Fields

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- Implement calculated fields and security
- Lab: Creating and managing fields

Module 5: Customizing Relationships and Mappings

- Creating entity and hierarchical relationships
- Understanding relationship behavior
- Lab: Configure field mapping and relationships

Module 6: Customizing Forms, Views, and Visualizations

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Module 7: Processes: Workflows, Business Process Flows, and Custom Actions

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Module 8: Architecture, Development, and Extensibility in Dynamics 365 CRM Apps

- Introduction to Dynamics 365 CRM Apps Web Service

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- Lab: Create workflows and business process flows

Module 9: Extending CRM Apps User Experience

- Client-side scripting and business rules

- Power Apps Component Framework (PCF)

- Lab: Use client script for Sales App customization and create a PCF for Sales

Module 10: Dynamics 365 CRM Web Services and Integration

- Custom connectors and Web API

- Plugins and Webhooks

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Module 11: Solution Management

- Managing solution components and understanding managed/unmanaged solutions

- Cloning solutions and patches

- Lab: Export/import managed and unmanaged solutions, create web hooks