

55242-A: Microsoft Dynamics 365 Customization and Configuration

Duration: 32 Hours (4 Days)

Course Overview

The 55242-A: Microsoft Dynamics 365 Customization and Configuration course is an in-depth training program designed to equip learners with the skills necessary to customize and configure the Dynamics 365 platform effectively. Throughout the course, participants will gain familiarity with various versions of Microsoft Dynamics 365, understand the underlying framework, and learn about the available tools for customizers. The course covers key topics such as Initial setup, security management, Entity creation, Field customization, Relationship and mapping configurations, as well as Form, view, and visualization customizations. Additionally, it delves into the Unified Client Interface (UCI), processes including Workflows and Business process flows, and comprehensive Solution management. Individuals who complete this course will be well-prepared for D365 customization and configuration, having received hands-on Microsoft Dynamics 365 customization and configuration training. This expertise is vital for professionals looking to tailor Dynamics 365 to meet specific business requirements and enhance overall system functionality.

Audience Profile

The 55242-A course focuses on the customization and configuration of Microsoft Dynamics 365, catering to IT professionals seeking advanced system skills.

- Dynamics 365 Customizers and Configurators
- IT Professionals working with CRM systems
- System Administrators managing Dynamics 365 environments
- Technical Support Specialists for Dynamics 365 solutions
- CRM Consultants specializing in Microsoft solutions
- Developers seeking to understand the backend setup of Dynamics 365
- Business Analysts tailoring Dynamics CRM to organizational needs
- Project Managers overseeing Dynamics 365 deployments
- Solution Architects designing integrations and customizations for Dynamics 365
- Technical Sales Professionals requiring in-depth product knowledge
- Power Platform Specialists working with Dynamics 365 and related Microsoft technologies

Course Syllabus

Module 1: Introduction

This module provides an introduction to customizing and configuring Microsoft Dynamics 365 Customer Engagement.

Lessons:

- Familiarize yourself with the versions of Microsoft Dynamics 365.
- Understand the Dynamics 365 framework.
- Review Dynamics 365 Devices, Apps, and Hubs.
- Explore tools for Dynamics 365 customizers.
- Gain a brief overview of Solutions.

- Learn the differences between Dynamics 365 organizations and environments.
- Discover further reading and resources.
- Set up the lab environment.
- Lab: Setting up Your Lab Environment
- Set up your lab and install sample data.
- After completing this module, students will be able to:
- Understand the components of Microsoft Dynamics 365.
- Learn the features of Dynamics 365 for Customer Engagement.
- Become familiar with the Dynamics 365 framework.
- Explore the Apps and Hubs in Microsoft Dynamics 365.
- Use built-in tools for customizers.
- Understand the significance of Solutions.
- Comprehend the fundamentals of organizations and environments.

Module 2: Initial Setup and Configuration

This module covers essential features that require setup and configuration in Microsoft Dynamics 365.

Lessons:

- Introduction to the Dynamics 365 Admin Center.
- Overview of the Dynamics 365 Deployment Manager.
- Introduction to the Power Platform Admin Center.
- Explore the System Settings area.
- Configure Auto Save Settings.
- Configure Format Settings.
- Configure Email Settings.
- Enable Skype Integration.
- Enable SharePoint Integration.
- Enable OneNote Integration.
- Configure Auditing.

Lab 1: Configure Dynamics 365 System Settings

- Configure Auto Save Settings.
- Configure Formatting Settings.
- Configure Email Settings.

Lab 2: Configure Dynamics 365 Audit Settings

- Enable Auditing in Dynamics 365.
- Enable Auditing for an entity.
- Configure Auditing for a field.

After completing this module, students will be able to:

- Perform setup and configuration for Dynamics 365 Customer Engagement.
- Configure System Settings, including Auto Save, Formatting, and Email options.
- Integrate Dynamics 365 with SharePoint, Skype for Business, and Exchange.

- Configure Auditing in Dynamics 365.

Module 3: Security

This module focuses on creating and maintaining a robust security model in Dynamics 365, covering Business Units, Security Roles, Users, Teams, and Access Teams.

Lessons:

- Design and configure Business Units.
- Configure Security Roles.
- Manage Users and Teams.
- Implement Access Teams.
- Configure Hierarchy Security.

Lab 1: Configure Users, Business Units, Security Roles, and Access Levels

- Add new users in Dynamics 365.
- Create new Business Units.
- Copy a Security Role and configure access levels.
- Assign users to Security Roles.
- Log in to Dynamics 365 as a different user to test permissions.

Lab 2: Configure Access Teams

- Configure an entity for Access Teams.
- Create an Access Team Template.
- Configure a Sub-Grid to use an Access Team.

Lab 3: Configure a Management Hierarchy

- Enable Hierarchy Security.
- Configure a Manager Hierarchy.

After completing this module, students will be able to:

- Manage security features in Dynamics 365.
- Configure Business Units, Security Roles, Access Levels, Users, and Teams.
- Differentiate between Teams and Access Teams.
- Configure Manager and Position Hierarchy Security.

Module 4: Creating and Managing Entities

This module focuses on customizing the Dynamics 365 model, including Entities, Relationships, Fields, and Forms.

Lessons:

- Introduction to the Dynamics 365 model.
- Review the different Entity Types.
- Create new custom Entities.
- Manage Entity Ownership.
- Configure Entity Properties.

- Set up Custom Entity Security.
- Explore Virtual Entities.
- Manage Entities and Solutions.

Lab: Creating and Managing Entities

- Create a new Solution.
- Create custom Entities and configure their properties.
- Add existing system Entities to a Solution.
- Configure permissions for custom Entities.

After completing this module, students will be able to:

- Understand Dynamics 365 model fundamentals.
- Identify the different Entity Types.
- Create new custom Entities.
- Manage Entity Properties.
- Understand the significance of Virtual Entities.
- Configure Entity Security.
- Use Solutions for managing Entity customizations.

Module 5: Customizing Fields

This module discusses the various field types in Dynamics 365, including special fields such as Calculated and Rollup Fields, and introduces the Business Rule Designer and Field Level Security.

Lessons:

- Introduction to Field Customization.
- Different Field Types.
- Review Field Formats.
- Create a new Field.
- Use Fields in Solutions.
- Implement Calculated Fields.
- Configure Field Level Security.

Lab 1: Creating and Managing Fields

- Create Fields.
- Create a Global Option Set.

Lab 2: Creating a Calculated Field

- Create a Calculated Field.
- Add Fields to an Entity Form.

Lab 3: Configuring Field Level Security

- Enable a Field for Field Level Security.
- Configure a Field Security Profile.

After completing this module, students will be able to:

- Customize Fields in Dynamics 365.

- Identify different Field Types and Formats.
- Use Solutions to manage Field customizations.
- Create and use Calculated Fields.
- Configure Field Level Security.