

KOENIG SOLUTIONS • COURSE OUTLINE

55242-A: Microsoft Dynamics 365 Customization and Configuration

Learn to customize and configure Dynamics 365, from security models and entities to fields, forms and solution management.

4 Days

32 HOURS

5

MODULES

39

TOPICS

29

HANDS-ON ACTIVITIES

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.

Who Should Attend

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

LEARNING OBJECTIVES

- Identify the versions and framework of Dynamics 365
- Explore tools available for Dynamics 365 customizers
- Configure system settings such as auto save and email
- Enable integrations including SharePoint and OneNote
- Design business units and configure security roles
- Implement access teams and hierarchy security
- Create and manage custom entities and their properties
- Configure fields including calculated and rollup fields

5 Modules, 39 Topics

01

2 Labs

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

02

3 Activities

4 Activities

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

03

5 Activities

3 Activities

2 Activities

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

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

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

Practise What You Learn

#	MODULE	ACTIVITY
01	Introduction	LAB ■ Setting up Your Lab Environment ■ Set up your lab and install sample data
02	Initial Setup and Configuration	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 ■ Configure Auditing in Dynamics 365
03	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
04	Creating and Managing Entities	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
05	Customizing Fields	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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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