

KOENIG SOLUTIONS • COURSE OUTLINE

# Microsoft Dynamics 365 CRM Developer

Learn to configure, customize and extend Microsoft Dynamics 365 CRM, from entities and forms to workflows, integrations and solution management.

**11**

MODULES

**22**

TOPICS

**11**

HANDS-ON LABS

## COURSE OVERVIEW

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.

## WHO THIS COURSE IS FOR

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.

## LEARNING OBJECTIVES

# What You Will Learn

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

## COURSE SYLLABUS

# 11 Modules, 22 Topics

01

Lab

## Introduction

### TOPICS

- Overview of Microsoft Dynamics 365 versions and framework
- Tools for Dynamics 365 customizers

02

Lab

## Initial Setup, Configuration, and Security

### TOPICS

Introduction to Dynamics 365 Admin Center · Design and configure business units · Configure security roles, users, and teams

03

Lab

## Creating and Managing Entities

### TOPICS

- Introduction to entity types and custom entities
- Managing entity properties and security

**04**

Lab

## Customizing Fields

### TOPICS

Field types and customization · Implement calculated fields and security

**05**

Lab

## Customizing Relationships and Mappings

### TOPICS

- Creating entity and hierarchical relationships
- Understanding relationship behavior

**06**

Lab

## Customizing Forms, Views, and Visualizations

### TOPICS

- Process of creating forms and customizations
- Customizing system views, charts, and dashboards

**07**

Lab

## Processes: Workflows, Business Process Flows, and Custom Actions

### TOPICS

Workflow and custom actions overview

**08**

Lab

## Architecture, Development, and Extensibility in Dynamics 365 CRM Apps

### TOPICS

- Introduction to Dynamics 365 CRM Apps Web Service
- Developer tools and coding

09

Lab

## Extending CRM Apps User Experience

### TOPICS

Client-side scripting and business rules · Power Apps Component Framework (PCF)

10

Lab

## Dynamics 365 CRM Web Services and Integration

### TOPICS

Custom connectors and Web API · Plugins and Webhooks

11

Lab

## Solution Management

### TOPICS

- Managing solution components and understanding managed/unmanaged solutions
- Cloning solutions and patches

### HANDS-ON LABS

## Practise What You Learn

| #  | MODULE                                                                | ACTIVITY                                                                 |
|----|-----------------------------------------------------------------------|--------------------------------------------------------------------------|
| 01 | Introduction                                                          | Setting up the lab environment                                           |
| 02 | Initial Setup, Configuration, and Security                            | Configure users, business units, and access levels                       |
| 03 | Creating and Managing Entities                                        | Configure access teams and management hierarchy                          |
| 04 | Customizing Fields                                                    | Creating and managing fields                                             |
| 05 | Customizing Relationships and Mappings                                | Configure field mapping and relationships                                |
| 06 | Customizing Forms, Views, and Visualizations                          | Configure system views, charts, and dashboards                           |
| 07 | Processes: Workflows, Business Process Flows, and Custom Actions      | Create workflows and business process flows                              |
| 08 | Architecture, Development, and Extensibility in Dynamics 365 CRM Apps | Create workflows and business process flows                              |
| 09 | Extending CRM Apps User Experience                                    | Use client script for Sales App customization and create a PCF for Sales |

| #  | MODULE                                               | ACTIVITY                                                                    |
|----|------------------------------------------------------|-----------------------------------------------------------------------------|
| 10 | <b>Dynamics 365 CRM Web Services and Integration</b> | Create a custom connector for Sales and a plugin for Sales data integration |
| 11 | <b>Solution Management</b>                           | Export/import managed and unmanaged solutions, create web hooks             |

#### 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.

#### FLEXIBLE DELIVERY

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Fly-Me-A-Trainer (FMAT)

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