



REAL WORLD
TECHNOLOGY TRAINING & SOLUTIONS
"Training You Can Really Use"

55242: Microsoft Dynamics® 365 Customization and Configuration

Duration: 3 Days

Method: Instructor-Led Training (ILT) | Live Online Training

Course Description

This course provides participants with detailed hands-on experience in setting up, configuring, customizing, extending and maintaining Microsoft Dynamics 365 Customer Engagement (CRM) Apps and Model-Driven Apps using the Power Apps Maker Portal and the Power Platform® Admin Center. Participants will gain an in-depth understanding of how to:

- Configure Environments through the Power Platform Admin Center,
- Set up and maintain Security,
- Customize the Sales and Customer Service Apps
- Create custom Model-Driven Apps and Canvas Apps using the Power Apps Maker Portal,
- Make model customizations to the Dataverse,
- Create and maintain Processes and Power Automate Flows, and
- Manage changes using Solutions to package and deploy customizations across multiple Environments.

By the end of this course, participants will know how to design, create, customize, and support business solutions and apps built on Microsoft Dynamics 365 Customer Engagement (CRM) and the Power Platform.

Target Audience

This course is intended for:

- Information Workers
- IT Professionals and Developers.



Microsoft Partner

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Prerequisites

To attend this course, candidates must have:

- Completed the prerequisite course, 55250: *Introduction to Microsoft Dynamics 365*, or have the equivalent knowledge and skills.
- Working knowledge of Microsoft Dynamics 365 and the Power Platform.

Course Objectives

Upon successful completion of this course, attendees will be able to:

- Undertake and carry out the initial setup and configuration required in a Microsoft Dynamics 365 deployment.
- Integrate complimenting Microsoft products such as SharePoint®, Skype® for Business and Exchange®.
- Design and configure a comprehensive Security model using the inbuilt tools in Microsoft Dynamics 365.
- Customize the Dynamics 365 schema by creating custom Entities, Fields and Relationships.
- Design custom Information Forms, Quick View Forms, Quick Create Forms and System Views.
- Create System Charts, Dashboards and Interactive Experience Dashboards.
- Create and manage Business Rules using the Business Rule Designer.
- Plan, design and implement best practice Workflow, Business Process Flows and Custom Actions.
- Apply best practice methodology using Unmanaged and Managed Solutions to deploy Microsoft Dynamics 365 customizations and patches.



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Course Topics

Module 1: Introduction

- Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
- The Microsoft Power Platform
- The Power Apps Maker Portal
- The Power Platform Admin Center
- Power Platform Environments
- Solutions Overview
- Introduction to Release Wave Updates
- Review Further Reading and Resources

Module 2: Setup and Configuration

- The Microsoft 365 Admin Center
- The Power Platform Admin Center
- The Dynamics 365 Admin Center
- The Power Apps Maker Portal
- Dynamics 365 Classic
- Microsoft Power Automate
- Microsoft Power BI
- Environment Level Settings
- Format Settings
- E-Mail Settings
- Skype and Teams Integration
- SharePoint Integration

Module 3: Security

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

Module 4: Creating and Managing Tables

- Introduction to the Data Modelling
- System and Custom Tables
- Create New Custom Tables
- Table Properties
- Table Type and Ownership
- Custom Table Security
- Tables and Solutions

Module 5: Customizing Columns

- Introduction to Columns
- Understand the Different Column Types
- Column Data Types
- Create a New Column
- Columns and Solutions
- Implement Calculated Columns
- Configure Column Level Security

Module 6: Customizing Relationships and Mappings

- Introduction to Relationships
- Relationship Types
- Create a Relationship
- Relationships and Solutions
- Understand Relationship Behaviour
- Implement a Hierarchy Relationship
- Configure Column Mappings





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Course Topics *Continued*

Module 7: Customizing Forms, Views and Visualizations

- Creating a New Form
- Form Types
- Using the Form Designer
- Customizing the Main, Card, Quick View and Quick Create Forms
- Configure Form Security
- Review the Different View Types
- Customizing Views
- Customizing Charts and Dashboards

Module 8: Model-Driven Apps

- Introduction to Model-Driven Apps
- The App Designer
- Configuring Apps

Module 9: Processes: Workflows, Business Process Flows and Power Automate

- Introduction to Processes
- Workflow
- Business Process Flows
- Building Flows in Power Automate

Module 10: Solution Management

- Introduction to Solution Management
- Add and Administer Components in a Solution
- Differences Between Unmanaged and Managed Solutions
- Solution Layers
- Export and Import a Solution
- Set Managed Properties for a Solution
- What Happens When a Solution Is Deleted?
- Clone a Solution Patch
- Clone a Solution

LABS INCLUDED



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