

3 Days

## 55242A: Microsoft Dynamics 365 Customization and Configuration Training Course

Microsoft Dynamics 365 Customization and Configuration course enables the participants with hands-on experience to set up, customize, configure, and maintain the CRM components of Microsoft Dynamics 365.

### Course Objective:

On completion of the course, you will be able to

- Comprehend the features and tools of Microsoft Dynamics 365
- Gain knowledge to integrate Sharepoint, Skype, and, etc.
- Setup and configure Microsoft Dynamics 365 deployment
- Design and configure a comprehensive Security model
- Customize the Dynamics 365 schema
- Design custom information, quick view, and other forms
- Create Dashboards and system charts
- Plan, design, and implement workflow
- Apply best practice methodology for Microsoft Dynamics 365

## Course Details

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### Course Outline

#### Module 1: Introduction

- Microsoft Dynamics 365/CRM versions
- Dynamics 365 framework
- Dynamics 365 organizations and environments
- Setup lab environment

#### Module 2: Initial Setup and Configuration

- Dynamics 365 online and on-premise setup
- Configure Autosave, format and email settings
- Configure Skype and Sharepoint Integration
- Review system settings area

#### Module 3: Security

- Design and configure business units
- Configure hierarchy security and roles
- Manage the users and the team
- Implement the Access Team

#### Module 4: Creating and Managing Entities

- Dynamics 365 schema
- Review, create and manage entities
- Entity ownerships, properties, and security

- Entities and solutions review

#### **Module 5: Customizing Fields**

- Field Customization
- Varied field types
- Creation of new field
- Field level security configuration

#### **Module 6: Customizing Relationships and Mappings**

- Relationships
- Review and create Relationship
- Relationships and Solutions review
- Configuration of Field Mappings

#### **Module 7: Customizing Forms, Views, and Visualizations**

- Creation and customization of Forms
- Configure Form security
- Review and customize View types
- Customize System charts and Dashboards

#### **Module 8: Processes: Workflows, Business Process Flows, and Custom Actions**

- Processes introduction
- Workflow
- Business Process Flows
- Custom Actions

#### **Module 9: Solution Management**

- Solution Management
- Add and administer solutions
- Export and import solution
- Cloning of solution and solution patch

## Who Should Attend

- Information workers
- IT Professionals
- Developers

## Pre Requisite

The attendees must have completed the course 'Introduction to Microsoft Dynamics 365'

OR

Must have working knowledge of Microsoft Dynamics 365 or Microsoft Dynamics CRM

## Exams

Microsoft Dynamics 365 Customization And Configuration [MB2-716]

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