55242: Microsoft Dynamics 365 Customization and Configuration

Course Details

Course Outline

1. **Introduction**
   - Getting familiar with the versions of Microsoft Dynamics CRM\365
   - Get acquainted with the Dynamics 365 framework
   - Review the Dynamics 365 interfaces, devices and apps
   - Understand the tools for Dynamics 365 customizers
   - A brief overview of Solutions
   - Understand the differences between Dynamics 365 organizations and environments
   - Review further reading and resources
   - Set up the lab environment - Acme Enterprises Event Management Solution
   - Lab : Setting up your Lab environment
     - Setup your Lab and install sample data

2. **Initial Setup and Configuration**
   - An introduction to Dynamics 365 online setup
   - An introduction to Dynamics 365 on premise setup
   - Review the System Settings area
   - Understand how to configure Auto Save Settings
   - Understand how to configure Format Settings
   - Understand how to configure Email Settings
   - Understand how to configure Skype Integration
   - Understand how to configure SharePoint Integration
   - Lab : Configure Dynamics 365 System Settings
     - Configure Auto Save Settings
     - Configure Formatting Settings
     - Configure Email Settings
   - Lab : Configure Dynamics 365 Audit Settings
     - Enable Auditing in Dynamics 365

- o Enable Auditing for an Entity
- o Configure Auditing for a Field

3. **Security**

- Design and configure Business Units
- Configure Security Roles
- Manage Users and Teams
- Implement Access Teams
- Configure Hierarchy Security
- Lab : Configure Users, Business Units, Security Roles and Access Levels
  - o Add new Users in Dynamics 365
  - o Create new Business Units
  - o Copy a Security Role and Configure Access Levels
  - o Assign Users to Security Roles
  - o Login to Dynamics 365 as a different User to test permissions
- Lab : Configure Access Teams
  - o Configure an Entity to be used in Access Teams
  - o Create an Access Team Template
  - o Configure a Sub-Grid to use an Access Team
- Lab : Configure a Management Hierarchy
  - o Enable Hierarchy Security
  - o Configure a Manager Hierarchy

4. **Creating and Managing Entities**

- Introduction to the Dynamics 365 schema
- Review the different Entity Types
- Create new Custom Entities
- Managing Entity Ownership
- Managing Entity Properties
- Custom Entity Security
- Review Entities and Solutions
- Lab : Creating and Managing Entities
  - o Creating a new Solution
  - o Create Custom Entities and configure Entity properties
  - o Add existing System Entities to a Solution
  - o Configure permissions for Custom Entities

5. **Customizing Fields**

- Introduction to Field Customization
- Understand the different Field Types
- Review Field Formats
- Create a new Field
- Review Fields and Solutions
- Implement a Calculated Field
- Configure Field Level Security
- Lab : Creating and Managing Fields
    - Creating Fields
    - Create a Global Option Set
- Lab : Creating a Calculated Field
    - Creating a Calculated Field
    - Add Fields to an Entity Form
- Lab : Configuring Field Level Security
    - Enable a Field for Field Level Security
    - Configure a Field Security Profile

6. **Customizing Relationships and Mappings**

- Introduction to Relationships
- Review the different Relationship Types
- Create a Relationship
- Review Relationships and Solutions
- Understand Relationship Behaviour
- Implement a Hierarchy Relationship
- Configure Field Mappings
- Lab : Create Entity Relationships
    - Create Entity Relationships
    - Configure Relationship Behaviour
- Lab : Create a Hierarchical Relationship
    - Configure a Hierarchical Relationship
- Lab : Configure Field Mappings
    - Configure Field Mappings

7. **Customizing Forms, Views and Visualizations**

- The process to create a new Form

- Review the different Form types

- Using the Form Designer

- Customizing the Main, Quick View and Quick Create Forms

- Configure Form Security

- Review the different View types

- Customizing System Views

- Customizing System Charts and Dashboards

- Lab : Customizing Forms

    o Customizing Forms

    o Create a Quick Create Form

    o Create a Quick View Form

- Lab : Configuring System Views

    o Create Custom System Views

- Lab : Configuring Charts and Dashboards

    o Configure a System Chart

    o Construct a System Dashboard

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

- Introduction to Processes

- Workflow

- Business Process Flows

- Custom Actions

- Lab : Create a Workflow

    o Create a Workflow

    o Define when a Workflow Starts

    o Adding Workflow Steps

    o Activating a Workflow

- Lab : Create a Business Process Flow

    o Create a Business Process Flow

    o Add Stages and Steps to a Business Process Flow

    o Configure Branching Logic in a Business Process Flow

9. **Solution Management**

- An introduction to Solution Management

- How to add and administer components in a Solution

- The differences between unmanaged and managed Solutions

- How to export and import a Solution

- How to set Managed Properties for a Solution

- What happens when you delete a Solution

- How to Clone a Solution Patch

- How to Clone a Solution

- Lab : Solution Management

    o Export an Unmanaged Solution

    o Import an Unmanaged Solution

    o Configuring Managed Properties

    o Export and Import Managed Solutions

    o Create a Solution Patch

    o Clone a Solution