

Overview

This 3-day course describes how to customize the Dynamics 365 platform (version 9.0) to meet business needs and processes. Students will discover the benefits and limitations of the customization features based on realistic scenarios in order to take the appropriate decisions for their own projects. The skills taught on this course can be used without any development or programming knowledge.

This training will help experienced users to customize their system without the need for external help.

Course Details

Module 1 Introduction to Customization

- Overview of Microsoft Dynamics 365
- Licensing and Client Options
- Examine Supporting Technologies
- General Overview of Customization Methods

Module 2 The Security Model

- Business Units
- Security Roles
- Manage Users and Teams
- Sharing Records

Module 3 Solutions

- Solutions Overview
- Including Components in Solutions
- Solution Publishers and Versioning
- Solution Types
- Working with Multiple Solutions
- Export and Import Solutions

Module 4 Customizing Entities

- Overview of Entities
- Entity Ownership
- Entity Properties
- System vs. Custom Entities
- Virtual Entities

Module 5 Customizing Fields

- Fields Overview
- Working with Different Types of Fields
- Using Calculated and Rollup Fields
- Working with Local and Global Option Sets
- Multi-select Option Sets
- Alternate Keys
- Field Level Security

Module 6 Manage Relationships

Duration

3 days

Audience Profile

This training is intended for administrators and consultants who need to customize Microsoft Dynamics 365 or need to know about the customization capabilities. The course is for students who are new to customization.

Prerequisites

Some experience of working with Microsoft Dynamics 365. An understanding of relational databases is also helpful but not required.

- Overview of Relationships
- 1 to Many and Many to Many Relationships
- Working with Hierarchical Data
- Using Entity Mapping to Pre-Populate Data
- Connection and Connection Roles

Module 7 Customizing Forms

- Form Types
- Form Components
- Using Access Teams and Sub-Grids for Record Sharing
- Working with Multiple Forms
- Mobile Apps
- Field Controls

Module 8 Business Rules

- Business Rules Overview
- Business Rule Structure
- Using Conditions and Actions

Module 9 Customizing Views

- Types of views
- Create views
- Customize views
- Editable Grids

Module 10 Business Process Flows

- Overview of Business Process Flows
- Use Stages, Steps, and Categories
- Review Options for Conditional Branching
- Process Flows and Security Roles

Module 11 Themes

- Create and Customize Charts
- Create and Customize Dashboards
- Work with Themes
- Default Themes