

Course duration

- 3 days

Course Benefits

- Understand the features and tools that exist in Microsoft Dynamics 365 for Customizers.
- Be aware of integrating complementing Microsoft products such as SharePoint, Skype for Business, and Exchange.
- Undertake and carry out the initial setup and configuration required in a Microsoft Dynamics 365 deployment.
- 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.
- Be able to apply best practice methodology using unmanaged and managed solutions to deploy Microsoft Dynamics 365 customizations and patches.

Available Delivery Methods

Public Class

Public expert-led online training from the convenience of your home, office or anywhere with an internet connection. Guaranteed to run .

Private Class

Private classes are delivered for groups at your offices or a location of your choice.

Course Outline

1. Introduction

1. Getting familiar with the versions of Microsoft Dynamics CRM\365
2. Get acquainted with the Dynamics 365 framework
3. Review the Dynamics 365 interfaces, devices and apps

4. Understand the tools for Dynamics 365 customizers
5. A brief overview of Solutions
6. Understand the differences between Dynamics 365 organisations and environments
7. Review further reading and resources
8. Set up the lab environment - Acme Enterprises Event Management Solution
9. Lab 1: Setting up your Lab environment
10. Setup your Lab and install sample data
2. Initial Setup and Configuration
 1. An introduction to Dynamics 365 online setup
 2. An introduction to Dynamics 365 on premise setup
 3. Review the System Settings area
 4. Understand how to configure Auto Save Settings
 5. Understand how to configure Format Settings
 6. Understand how to configure Email Settings
 7. Understand how to configure Skype Integration
 8. Understand how to configure SharePoint Integration
 9. Lab 1: Configure Dynamics 365 System Settings
 10. Configure Auto Save Settings
 11. Configure Formatting Settings
 12. Configure Email Settings
 13. Lab 2: Configure Dynamics 365 Audit Settings
 14. Enable Auditing in Dynamics 365
 15. Enable Auditing for an Entity
 16. Configure Auditing for a Field
3. Security
 1. Design and configure Business Units
 2. Configure Security Roles
 3. Manage Users and Teams
 4. Implement Access Teams
 5. Configure Hierarchy Security
 6. Lab 1: Configure Users, Business Units, Security Roles and Access Levels
 7. Add new Users in Dynamics 365
 8. Create new Business Units
 9. Copy a Security Role and Configure Access Levels
 10. Assign Users to Security Roles
 11. Login to Dynamics 365 as a different User to test permissions
 12. Lab 2: Configure Access Teams
 13. Configure an Entity to be used in Access Teams
 14. Create an Access Team Template
 15. Configure a Sub-Grid to use an Access Team
 16. Lab 3: Configure a Management Hierarchy
 17. Enable Hierarchy Security
 18. Configure a Manager Hierarchy
4. Creating and Managing Entities
 1. Introduction to the Dynamics 365 schema
 2. Review the different Entity Types

3. Create new Custom Entities
4. Managing Entity Ownership
5. Managing Entity Properties
6. Custom Entity Security
7. Review Entities and Solutions
8. Lab 1: Creating and Managing Entities
9. Creating a new Solution
10. Create Custom Entities and configure Entity properties
11. Add existing System Entities to a Solution
12. Configure permissions for Custom Entities
5. Customizing Fields
 1. Introduction to Field Customization
 2. Understand the different Field Types
 3. Review Field Formats
 4. Create a new Field
 5. Review Fields and Solutions
 6. Implement a Calculated Field
 7. Configure Field Level Security
 8. Lab 1: Creating and Managing Fields
 9. Creating Fields
 10. Create a Global Option Set
 11. Lab 2: Creating a Calculated Field
 12. Creating a Calculated Field
 13. Add Fields to an Entity Form
 14. Lab 3: Configuring Field Level Security
 15. Enable a Field for Field Level Security
 16. Configure a Field Security Profile
6. Customizing Relationships and Mappings
 1. Introduction to Relationships
 2. Review the different Relationship Types
 3. Create a Relationship
 4. Review Relationships and Solutions
 5. Understand Relationship Behaviour
 6. Implement a Hierarchy Relationship
 7. Configure Field Mappings
 8. Lab 1: Create Entity Relationships
 9. Create Entity Relationships
 10. Configure Relationship Behaviour
 11. Lab 2: Create a Hierarchical Relationship
 12. Configure a Hierarchical Relationship
 13. Lab 3: Configure Field Mappings
 14. Configure Field Mappings
7. Customizing Forms, Views and Visualizations
 1. The process to create a new Form
 2. Review the different Form types
 3. Using the Form Designer
 4. Customizing the Main, Quick View and Quick Create Forms

5. Configure Form Security
6. Review the different View types
7. Customizing System Views
8. Customizing System Charts and Dashboards
9. Lab 1: Customizing Forms
10. Customising Forms
11. Create a Quick Create Form
12. Create a Quick View Form
13. Lab 2: Configuring System Views
14. Create Custom System Views
15. Lab 3: Configuring Charts and Dashboards
16. Configure a System Chart
17. Construct a System Dashboard
8. Processes: Workflows, Business Process Flows and Custom Actions
 1. Introduction to Processes
 2. Workflow
 3. Business Process Flows
 4. Custom Actions
 5. Lab 1: Create a Workflow
 6. Create a Workflow
 7. Define when a Workflow Starts
 8. Adding Workflow Steps
 9. Activating a Workflow
 10. Lab 2: Create a Business Process Flow
 11. Create a Business Process Flow
 12. Add Stages and Steps to a Business Process Flow
 13. Configure Branching Logic in a Business Process Flow
9. Solution Management
 1. An introduction to Solution Management
 2. How to add and administer components in a Solution
 3. The differences between unmanaged and managed Solutions
 4. How to export and import a Solution
 5. How to set Managed Properties for a Solution
 6. What happens when you delete a Solution
 7. How to Clone a Solution Patch
 8. How to Clone a Solution
 9. Lab 1: Solution Management
 10. Export an Unmanaged Solution
 11. Import an Unmanaged Solution
 12. Configuring Managed Properties
 13. Export and Import Managed Solutions
 14. Create a Solution Patch
 15. Clone a Solution

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

- A working knowledge of Microsoft Dynamics 365 or Microsoft Dynamics CRM.