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Learning Style: Virtual Classroom

Technology: Microsoft

Difficulty: Intermediate

Course Duration: 3 Days

Microsoft Dynamics 365 Customization and Configuration (MS-55242)



***The exam associated with this course will retire on 31st January 2021.
However, the course is still valid as training material for learning purposes.***

About this course:

This course provides students with a detailed hands-on experience of setting up, customizing, configuring and maintaining the CRM components of Microsoft Dynamics 365.

Attendees of this course will gain an in-depth understanding of the Dynamics 365 security model, learn how to customize the Dynamics 365 framework, create and maintain powerful workflows and business process flows and use solutions to package and deploy customizations across multiple Dynamics 365 environments.

The course applies to both Business and Enterprise Editions of Dynamics 365 as well as Online and On-premise deployments. The July 2017 V9 release of Dynamics 365 is considered and course objectives map directly to the MB2-716 certification exam.

The average salary for a Dynamics 365 Developer is **\$87,450** per year.

Course Objective:

After completing this course, students will be able to:

- Understand the features and tools that exist in Microsoft Dynamics 365 for Customizers
- Be aware of integrating complimenting 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

Audience:

- This course is intended for Information workers, IT Professionals and Developers. Students should have an existing working

knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM.

Prerequisite:

Before attending this course, students must have:

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

Course Outline:

Module 1: Introduction

This module provides the attendee with an introduction to the concept of customizing and configuring the Dynamics 365 framework.

Lessons

- Be 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 organisations 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

After completing this module, students will be able to:

- Understand the different versions of CRM and Dynamics 365
- Learn what the differences are between Dynamics CRM 2016 and Dynamics 365
- Be introduced to the Dynamics 365 Framework
- Be aware of the different interfaces to Dynamics 365
- Be introduced to some of the inbuilt tools for Customizers
- Understand about the significance of Solutions in Microsoft Dynamics 365
- Be aware of the fundamentals of Organizations and Environments

Module 2: Initial Setup and Configuration

This module presents some of the most common features that require setup and configuration when Dynamics 365 is first installed.

Lessons

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

After completing this module, students will be able to:

- Perform the steps necessary to setup and configure Dynamics 365 Online and On-Premise
- Understand the licensing options for Dynamics 365
- Be able to configure Systems Settings including Auto Save, Formatting options and Email Settings
- Be aware of integration Dynamics 365 with SharePoint, Skype for Business and Exchange

Module 3: Security

This module highlights the importance of maintaining a robust security model in Dynamics 365 by stepping through how to configure Business Units, Security Roles, Users and Teams. Access Teams and Hierarchy Security are also considered.

Lessons

- 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

- Add new Users in Dynamics 365
- Create new Business Units
- Copy a Security Role and Configure Access Levels
- Assign Users to Security Roles
- Login to Dynamics 365 as a different User to test permissions

Lab : Configure Access Teams

- Configure an Entity to be used in Access Teams
- Create an Access Team Template
- Configure a Sub-Grid to use an Access Team

Lab : Configure a Management Hierarchy

- Enable Hierarchy Security
- Configure a Manager Hierarchy

After completing this module, students will be able to:

- Manage Security features in Microsoft Dynamics 365
- Configure Business Units, Security Roles, Access Levels, Users and Teams
- Know the difference between Teams and Access Teams
- Configure Manager and Position Hierarchy Security

Module 4: Creating and Managing Entities

In this module, we will start to look at customizing the Dynamics 365 schema, including Entities, Relationships, Fields and Forms which can be customized and extended using powerful inbuilt tools.

Lessons

- 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

- Creating a new Solution
- Create Custom Entities and configure Entity properties

- Add existing System Entities to a Solution
- Configure permissions for Custom Entities

After completing this module, students will be able to:

- Understand Dynamics 365 schema fundamentals
- Know the different Entity Types
- The process to create new Custom Entities
- Manage Entity Properties
- Configure Entity Security
- Manage Entity customizations with Solutions

Module 5: Customizing Fields

This module presents the different Field types that exist in Dynamics 365 including special Fields like Calculated and Rollup Fields. The Business Rule Designer is also introduced together with Field Level Security.

Lessons

- 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

After completing this module, students will be able to:

- Understand the process to customize Fields in Dynamics 365
- Know the different Field Types and Formats
- Be able to manage Field customizations using Solutions

- Create a Calculated Field
- Configure Field Level Security
- Calculated Fields
- Use the Business Rule Designer to configure Field validation

Module 6: Customizing Relationships and Mappings

This module provides an overview of the different types of Relationships that can be created in Dynamics 365. Relationship Behaviors and Mappings are also considered.

Lessons

- 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 Behavior

Lab : Create a Hierarchical Relationship

- Configure a Hierarchical Relationship

Lab : Configure Field Mappings

- Configure Field Mappings

After completing this module, students will be able to:

- Understand the different Relationship Types
- Be able to create a 1 to Many and Many to Many Relationship
- Know how to manage Relationship customizations using Solutions
- Understand how to configure Relationship Behavior
- Know how to create a Hierarchical Relationships
- Be able to configure Field Mappings

Module 7: Customizing Forms, Views and Visualizations

This module steps through the process to create, customize and configure Forms, Views, Charts and Dashboards in Dynamics 365.

Lessons

- 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

- Customizing Forms
- Create a Quick Create Form
- Create a Quick View Form

Lab : Configuring System Views

- Create Custom System Views

Lab : Configuring Charts and Dashboards

- Configure a System Chart
- Construct a System Dashboard

After completing this module, students will be able to:

- Know the various Form Types in Dynamics 365
- Be able to customize existing Forms and create new custom Forms
- Configure Form Security
- Be able to customize existing System Views and create new custom System Views
- Be able to customize existing System Charts and create new custom System Charts
- Be able to customize existing System Dashboards and create new custom System Dashboards

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

In this module you will learn how to create and maintain Workflows, Business Process Flows and Custom Actions in Dynamics 365.

Lessons

- Introduction to Processes
- Workflow
- Business Process Flows
- Custom Actions

Lab : Create a Workflow

- Create a Workflow
- Define when a Workflow Starts
- Adding Workflow Steps
- Activating a Workflow

Lab : Create a Business Process Flow

- Create a Business Process Flow
- Add Stages and Steps to a Business Process Flow
- Configure Branching Logic in a Business Process Flow

After completing this module, students will be able to:

- Apply best practice when designing and implementing business process automation in Dynamics 365
- Understand the different types of 'Processes' in Dynamics 365
- Create a Workflow to perform various actions
- Create a Dialog to guide a user through a business process
- Create a Business Process Flow to guide a user through a business process
- Understand the benefits of Custom Actions

Module 9: Solution Management

In this module, you will learn how to create and manage Solutions in Dynamics 365 across multiple environments.

Lessons

- 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

- Export an Unmanaged Solution

- Import an Unmanaged Solution
- Configuring Managed Properties
- Export and Import Managed Solutions
- Create a Solution Patch
- Clone a Solution

After completing this module, students will be able to:

- Understand Solution principals in Dynamics 365
- Add and update Solution Components
- Know the difference between Managed and Unmanaged Solutions
- Understand the Export and Import process
- Know how to apply Managed Properties
- Know how to manage Solution releases using 'Clone as Patch' and 'Clone as Solution'

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