55242 Microsoft Dynamics 365 Customization and Configuration

Category: Business Applications | **Vendor:** Microsoft

Duration: 24.00 hours (3 days) **19.5 CPD Hours** **Rating:** ⭐ 4.6 (5,878 reviews)

Course Information

Delivery Format: Instructor Led - Online

Course Overview

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.

About This Course

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Who Should Attend

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.

Learning Outcomes

Upon successful completion of this course, participants 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, Skpe 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

Detailed Course Outline

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 organisations and environments
- Review further reading and resources
- Set up the lab environment - Acme Enterprises Event Management Solution

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

Security

- Design and configure Business Units
- Configure Security Roles
- Manage Users and Teams
- Implement Access Teams
- Configure Hierarchy Security

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

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

Customizing Relationships and Mappings

- Introduction to Relationships
- Review the different Relationship Types
- Create a Relationship
- Review Relationships and Solutions
- Understand Relationship Behavior
- Implement a Hierarchy Relationship
- Configure Field Mappings

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

Workflows, Business Process Flows and Custom Actions

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

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

Additional Course Details

Nexus Humans 55242 Microsoft Dynamics 365 Customization and Configuration training program is a workshop that presents an invigorating mix of sessions, lessons, and masterclasses meticulously crafted to propel your learning expedition forward.

This immersive bootcamp-style experience boasts interactive lectures, hands-on labs, and collaborative hackathons, all strategically designed to fortify fundamental concepts.

Guided by seasoned coaches, each session offers priceless insights and practical skills crucial for honing your expertise. Whether you're stepping into the realm of professional skills or a seasoned professional, this comprehensive course ensures you're equipped with the knowledge and prowess necessary for success.

While we feel this is the best course for the 55242 Microsoft Dynamics 365 Customization and Configuration course and one of our Top 10 we encourage you to read the course outline to make sure it is the right content for you.

Additionally, private sessions, closed classes or dedicated events are available both live online and at our training centres in Dublin and London, as well as at your offices anywhere in the UK, Ireland or across EMEA.

Frequently Asked Questions

Q: What delivery options are available for 55242 Microsoft Dynamics 365 Customization and Configuration?

We offer multiple delivery formats:

- Live Instructor-Led Classroom Online (Virtual/Live Online)
- Traditional Instructor-Led Classroom Training (ILT)
- On-site delivery at your offices anywhere in United Kingdom
- Private dedicated courses customized for your team

Q: How many CPD hours does this course provide?

The 3-day 55242 Microsoft Dynamics 365 Customization and Configuration course provides up to 19.5 CPD hours of structured learning. CPD certificates can be provided upon request.

Q: What is the duration of the 55242 Microsoft Dynamics 365 Customization and Configuration training?

The training takes place over 3 day(s), with each day lasting approximately 24.00 hours including breaks for lunch and refreshments.

Q: Do you provide corporate training for 55242 Microsoft Dynamics 365 Customization and Configuration?

Yes, we provide corporate training, dedicated training, and closed classes for 55242 Microsoft Dynamics 365 Customization and Configuration. Training can take place anywhere in United Kingdom including London, Manchester, Birmingham, Edinburgh, or live online allowing teams from across United Kingdom or internationally to attend.

Q: Why choose Nexus Human for 55242 Microsoft Dynamics 365 Customization and Configuration?

Nexus Human is recognized as one of the leading training providers. Our trainers have won multiple awards including:

- Small Firms Best Trainer Award
- National Training Partner of the Year (Ireland) - Multiple Years
- Global Top 30 Instructor Awards (2012, 2019, 2021)
- Tech Excellence Award Nominations
- Learning Performance Institute (LPI) External Training Provider Sponsor 2024

Q: Are there any discount codes available?

Yes! Use discount code **PENPAL5** when booking your 55242 Microsoft Dynamics 365 Customization and Configuration training. Please note that only one discount code can be used per booking and cannot be combined with other special offers.

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