

MOC 55424 BC Microsoft Dynamics 365 Customization and Configuration

Course Summary

Description

This course provides students with a detailed hands-on experience of setting up, configuring, customizing, extending and maintaining Microsoft Dynamics 365 Customer Engagement (CRM) Apps and Model-driven Apps using the Power Apps Maker Portal and the Power Platform Admin Center.

Attendees of this course will gain an in-depth understanding of configuring Environments through the Power Platform Admin Center, set up and maintaining Security, learn how to customize the Sales and Customer Service Apps, create custom Model-driven Apps using the Power Apps Maker Portal, make model customizations to the Common Data Service, create and maintain Workflows and Power Automate Flows, and manage changes using Solutions to package and deploy customizations across multiple Environments.

By the end of this 3 day course, attendees will know how to design, create, customize and support business solutions and apps built on Microsoft Dynamics 365 Customer Engagement (CRM) and the Power Platform

Objectives

At the end of 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

Topics

- Introduction
- Setup and Configuration
- Security
- Creating and Managing Entities
- Customizing Fields
- Customizing Relationships and Mappings
- Customizing Forms, Views and Visualizations
- Model-driven Apps
- Processes: Workflows, Business Process Flows and Power Automate
- Solution Management

Audience

This course is intended for Information workers, IT Professionals and Developers.

Prerequisites

Students should have an existing working knowledge of Microsoft Dynamics 365 and the Power Platform. As a minimum, students should attend the prerequisite course '55250: Introduction to Microsoft Dynamics 365'.

Duration

Three days

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Course Outline

I. Introduction

This module provides the attendee with an introduction to the concept of creating custom Apps for Microsoft Dynamics 365 Customer Engagement. The concept of the Power Platform and Power Apps is presented, together with an initial overview of the Power Apps Maker portal and the Power Platform Admin Center.

- A. Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
 - B. The Microsoft Power Platform
 - C. The Power Apps Maker Portal
 - D. The Power Platform Admin Center
 - E. Power Platform Environments
 - F. Solutions Overview
 - G. As introduction to Release Wave Updates
 - H. Review further reading and resources
- Labs - Acme Enterprises Event Management Solution
- Lab 1: Setting up your Lab environment
 - Setup your Lab and install sample data

II. Setup and Configuration

This module presents some of the most common features and areas that require configuration when provisioning and managing Dynamics 365 Apps and Power Platform Environments. This module guides you through the different portals and interfaces as well as common configuration Environmental Settings.

- A. The Microsoft 365 Admin Center
- B. The Power Platform Admin Center
- C. The Dynamics 365 Admin Center
- D. The Power Apps Maker Portal
- E. Dynamics 365 Classic
- F. Microsoft Power Automate
- G. Microsoft Power BI
- H. Environment Level Settings
- I. Format Settings
- J. Email Settings
- K. Skype and Teams Integration
- L. SharePoint Integration
 - Lab 1: Configure Environment Settings
 - Configure Environment Settings
 - Configure Formatting Settings
 - Lab 2: Configure Audit Settings
 - Enable Auditing
 - Enable Auditing for an Entity
 - Configure Auditing for a Field

III. Security

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

- A. Design and configure Business Units
- B. Configure Security Roles
- C. Manage Users and Teams
- D. Implement Access Teams
- E. Configure Hierarchy Security
 - Lab 1: Configure Users, Business Units, Security Roles and Access Levels
 - Create new Users in Microsoft 365
 - Add Users to an Environment and assign Security Roles
 - Create new Business Units
 - Copy a Security Role and Configure Access Levels
 - Assign Users to Security Roles

IV. Creating and Managing Entities

In this module we will start to look at customizing the data model of the Common Data Service (CDS) to build custom apps in Microsoft Dynamics 365. The model consists of Entities, Relationships and Fields which can be customized and extended using the Power Apps Maker portal. This module serves as an introduction to the Data Modelling, including customizing Entities and configuring Entity properties.

- A. Introduction to the Data Modelling
- B. System and Custom Entities
- C. Create new Custom Entities
- D. Entity Properties
- E. Entity Type and Ownership
- F. Custom Entity Security
- G. Entities and Solutions
 - Lab 1: Creating and Managing Entities
 - Creating a Solution
 - Creating Custom Entities
 - Add existing System Entities to a Solution
 - Configure permissions for Custom Entities
 - Create a Model-driven App

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Course Outline (cont'd)

V. Customizing Fields

Fields are used in Dynamics 365 Apps to capture data entered by the user. The Common Data Services (CDS) supports a number of different Field data types and formats, all of which are presented in this module. Special Field types such as Calculated Fields are also considered, as well as securing data using Field Level Security.

- A. Introduction to Field
- B. Understand the different Field Types
- C. Field Data Types
- D. Create a new Field
- E. Fields and Solutions
- F. Implement a Calculated Field
- G. Configure Field Level Security
 - Lab 1: Creating and Managing Fields
 - Creating Fields
 - Create a Global Option Set
 - Lab 2: Creating a Calculated Field
 - Creating a Calculated Field
 - Add Fields to an Entity Form
 - Lab 3: Configuring Field Level Security
 - Enable a Field for Field Level Security
 - Configure a Field Security Profile

VI. Customizing Relationships and Mappings

Relationships associate an Entity with another Entity. This module provides an overview of the different types of Relationships that can be created in the Common Data Services. We also look at Relationship Mappings and how they can be used to pass values between related Entities to reduce duplicate data entry.

- A. Introduction to Relationships
- B. Relationship Types
- C. Create a Relationship
- D. Relationships and Solutions
- E. Understand Relationship Behaviour
- F. Implement a Hierarchy Relationship
- G. Configure Field Mappings
 - Lab 1: Create Entity Relationships
 - Create a 1 to Many Relationship
 - Lab 2: Create a Hierarchical Relationship
 - Configure a Hierarchical Relationship
 - Lab 3: Configure Field Mappings
 - Configure Field Mappings

VII. Customizing Forms, Views and Visualizations

In this module you will learn how to customize and create the different Form types that exist in Dynamics 365 Model-driven Apps, as well as control access to forms using Form Level Security. The process to configure the different View types is also presented, as well as creating custom Charts and Dashboards.

- A. Creating a new Form
- B. Form types
- C. Using the Form Designer
- D. Customizing the Main, Card, Quick View and Quick Create Forms
- E. Configure Form Security
- F. Review the different View types
- G. Customizing Views
- H. Customizing Charts and Dashboards
 - Lab 1: Customizing Forms
 - Customising Forms
 - Create a Quick Create Form
 - Embed a Quick View Form
 - Lab 2: Configuring System Views
 - Create Custom Views
 - Lab 3: Configuring Charts and Dashboards
 - Configure Charts
 - Construct a Dashboard

VIII. Model-driven Apps

This module looks at Model-driven apps in the Power Apps Maker Portal, including using the App Designer to create and customize Apps for Microsoft Dynamics 365 Customer Engagement.

- A. Introduction to Model-driven Apps
- B. The App Designer
- C. Using the Sitemap Designer
- D. Configuring Apps
 - Lab 1: The App Designer
 - Use the App Designer to create and customize Model-driven Apps
 - Lab 2: The App Designer
 - Use the App Designer to create and customize Model-driven Apps

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Course Outline (cont'd)

IX. Processes: Workflows, Business Process Flows and Power Automate

In this module you will learn how to create and maintain Workflows, Business Process Flows and Flows in Microsoft Power Automate.

- A. Introduction to Processes
- B. Workflow
- C. Business Process Flows
- D. Building Flows in Power Automate
 - Lab 1: Create a Workflow
 - Create a Workflow
 - Define when a Workflow Starts
 - Adding Workflow Steps
 - Activating a Workflow
 - Lab 2: Create Business Process Flows
 - Create a Business Process Flow
 - Add Stages to a Business Process Flow
 - Add Data and Action Steps to a Business Process Flow
 - Configure Branching Logic in a Business Process Flow
 - Lab 3: Building Flows in Power Automate
 - Navigate to the Power Automate Center
 - Build a Flow using Actions and Formula
 - Use 'My Flows' to Test and Diagnose issues

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

X. Solution Management

In this module you will learn how to create and manage Solutions in the Power Apps Maker Portal. Solutions act as a container for your customizations, allowing you to easily package, distribute and deploy changes across multiple Environments.

- A. An introduction to Solution Management
- B. How to add and administer components in a Solution
- C. The differences between unmanaged and managed Solutions
- D. Solution Layers
- E. How to export and import a Solution
- F. How to set Managed Properties for a Solution
- G. What happens when you delete a Solution
- H. How to Clone a Solution Patch
- I. How to Clone a Solution
 - Lab 1: Solution Management
 - Export an Unmanaged Solution
 - Import an Unmanaged Solution