**Task 1: Dynamics 365 Customization and Migration Plan**

Customization of the Lead Entity:

* First approach will be to add new fields using Dynamics 365’s field editor; and include form scripts for interactivity using JavaScript to ensure scalability.
* Also, I will customize the Ribbon by using Ribbon workbench and manage permissions with business rules to keep the customization manageable. This is different from Security role.
* Also, I will ensure scalability by following best practices for sectional scripts and version control through solutions.
* A solution will cover all the components, changes or upgrade would be made on Dev, through UAT environment to Production environment.

Automating Lead Qualification to Opportunity:

* Power Automate can be used to automate the lead conversion and assign opportunities to the Retail department, with respective Business Rule in place.
* Also, for complex logic, plugins will be best to handle conditional workflows, with plugins tied to specific events and custom workflows for qualifications.
* I can create a plug that triggers when the team of the person triggering the qualification is a member of the Retail team.
* Same can be extended to the customer workflow where check is done on the team the source of trigger belongs to.

Data Access Strategy for Leads:

* Implement a role-based access model and custom sharing rules where Marketing retains read-only access to leads they refer, while subsidiaries maintain read/write permissions.
* Use custom business rules and custom views for controlled visibility.
* Also, a custom plugin could be added to the lead form that grants read only access to anybody from the Marketing team and read write access to the subsidiary team.
* This plugin can be added to the Onload and Onsave functions of the form properties.

Lead Migration Strategy:

* Use the Dynamics 365 Data Migration Tool, ensuring that relationships and role-based access models are preserved to maintain security privileges and data integrity during migration.
* For the leads, we could use an ETL but for the relationship and security, I will most likely be using xrm toolbox

Email Migration:

* Use Dynamics 365’s Email Router or Server-Side Synchronization for a seamless transition of email messages to the cloud and ensure reliable email tracking on the timeline.

On-Premises API Integration:

* I will leverage azure service Bus or Logic Apps for API connectivity, ensuring secure, bidirectional data sync.
* Implement robust monitoring through Azure Monitor and Application Insights for seamless issue tracking.

Team-Shared Records Migration:

* Utilize Power Platform Dataflows or third-party migration tools like KingswaySoft to move team-shared records and reapply security roles and sharing permissions post-migration.
* KingswaySoft is a great tool.

Personal Views and Dashboards Migration:

* Use the Configuration Migration tool or XrmToolBox’s View Transfer Tool for user-created views and dashboards, ensuring seamless integration and customizations in the cloud environment.
* Most times, I will be using XrmToolBox for this migration.