

MS Dynamics CRM 365

Introduction to Customizing Dynamics 365



Lesson Objectives

- Overview of Dynamics CRM
- Dynamics CRM Licensing and Connection Options
- Examine Supporting Technologies
- General Overview of CRM Customization Principals



What is Dynamics 365?

- Apps that work together seamlessly in the cloud
- Apps can be purchased for easy deployment or built using XRM framework
- XRM framework provides:
 - Security, Workflow, Reporting, UI and Data Modeling





Why Customize?

- Allow Using built-in tools to tailor application to your specific needs
 - Processes, Form/View changes, Charts, Dashboards, etc.
- Additional Items can be purchased from App Source



Application Module vs. Framework

- Application Modules
 - Sales, Marketing and Service
 - Built on top of the Framework
- Framework
 - User interaction across multiple devices and experiences
 - Declarative data modeling
 - Flexible role based security model
 - Scalable platform architecture
 - Client and Server extensibility
 - Solution Framework for managing customizations



Built-in Functionality

- Before you start designing your own custom items to extend the application, consider the built-in options available
- Process Tracking and Automation:
 - Workflows Dialogs, Business Process Flows, Custom Actions
 - Client Side Customizations:
 - Business Rules, Rollup Fields, Calculated Fields, etc.



The Dynamics 365 User Experience

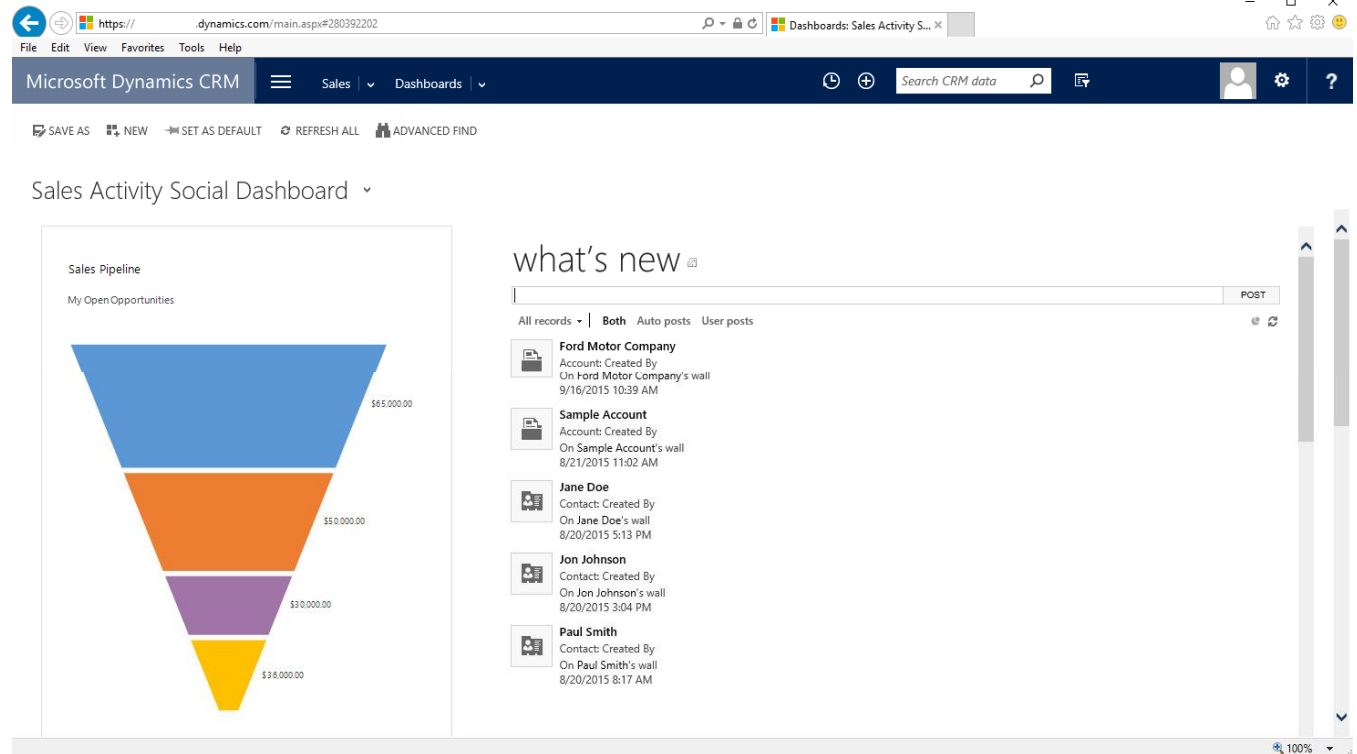
- Web Client
- Outlook Client
- Phone and Tablet
- Completely Custom Client



Web Client

Supported Browsers

- IE 10 and 11
- Mozilla Firefox
- Google Chrome
- Apple Safari





Outlook Clients

■ Traditional Outlook Client

- Synchronize Dynamics 365 records with Outlook folders
- Provide offline capability
- App for Outlook
 - No client to install
 - Works in Outlook and OWA

My Active Accounts x Active Accounts

Search for records

ACCOUNT NAME	MAIN PHONE	ADDRESS 1: CITY	PRIMARY CONTACT	EMAIL (PRIMARY CONTACT)	CATEGORIES
123 Company	555-1212	Fargo			
A. Datum Corporation (sample)	555-0158	Redmond	Bene Valdes (sample)	someone_1@example.com	
ABC Company	555-1986	Redmond			
Adventure Works (sample)	555-0152	Santa Cruz			
Adventure Works (sample)	555-0152	Santa Cruz			
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_1@example.com	

1 - 17 of 17

123 Company

Annual Revenue: No. of Employees: Owner: ☐

ACCOUNT INFORMATION

Account Name: 123 Company

Phone: [555-1212](tel:555-1212)

Fax:

Website: <http://www.123company.com>

Parent Account:

Dynamics CRM + Get more apps

✉ Track this email in CRM regarding...

[Or, track without setting a regardi...](#)

Accounts (+)

To track this email regarding a new record, click the Create icon above.

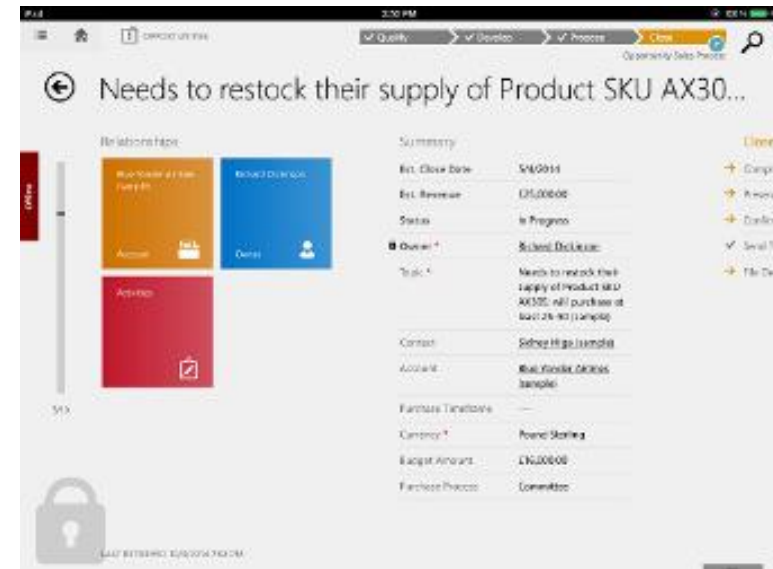
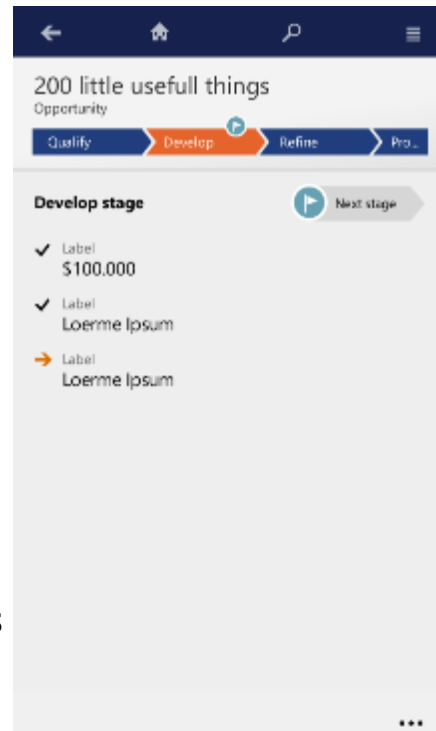
Contacts (+)

To track this email regarding a new record, click the Create icon above.



Mobile

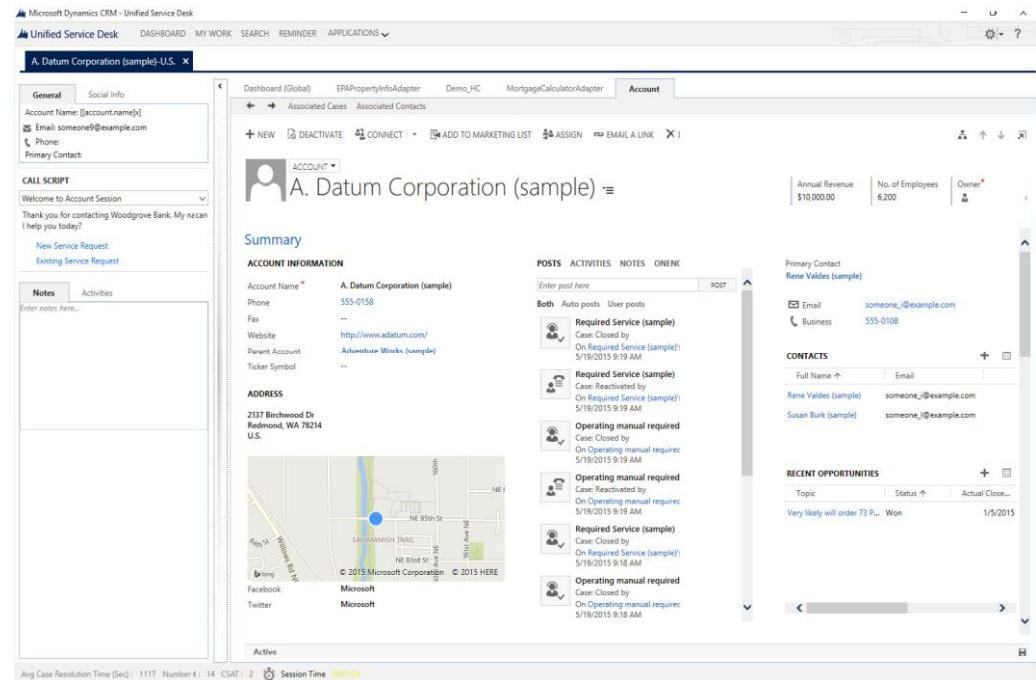
- Tablet
 - Dashboard
 - Offline drafts
 - Open In Browser
 - Offline search
- Phone
 - Hide from phone
 - Fields, Sections, Tabs and Lists





Other Client Options

- Unified Service Desk
 - Desktop application
 - Connection to Dynamics365
 - LOB applications
 - Multiple sessions
 - Configuration done in Dynamics 365
- Completely custom client



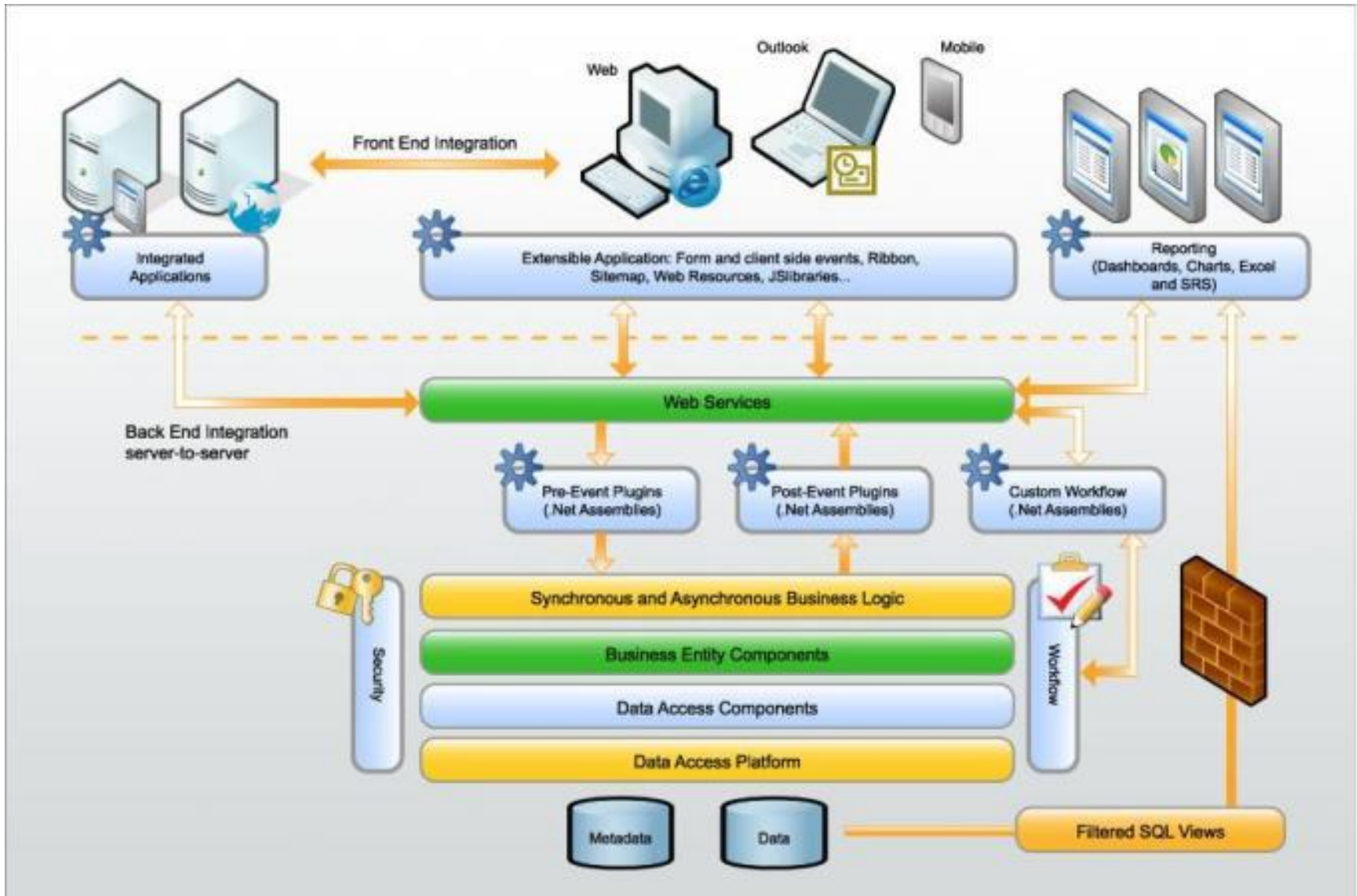


Platform Responsibilities

- Key responsibilities of the platform includes
 - Controls access to objects through security
 - Controls access to the database
 - Raises events for workflow processes and custom business logic implementations
- Except for reports, every application that interacts with Microsoft Dynamics 365 does so through web service in the Microsoft Dynamics 365 platform
- The platform provides the entire infrastructure required to implement a complete Microsoft Dynamics 365 application



Multi-Tier Architecture





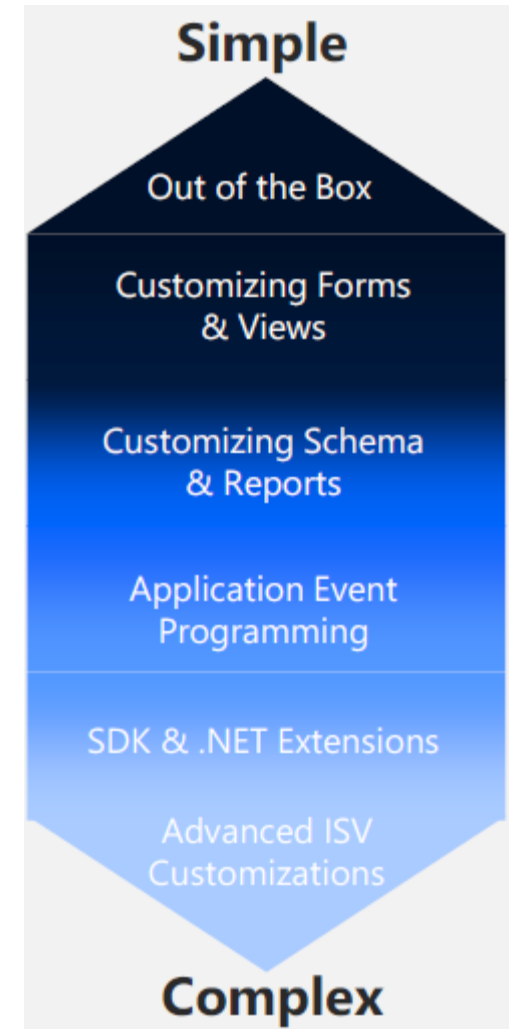
Customization Methodology

- An effective implementation methodology must consider each of the ways in which an organization can implement customizations. These can include:
 - Deployment customizations
 - Re-Using customizations
 - ISV products
 - Microsoft Dynamics 365 SDK



Customization Methodology

- Think of customizations as a continuum of enhancements
 - Can range from simple to complex
- Business Requirements should drive changes
- An ideal environment is balance between out-of-the-box deployment verses “everything for everyone”





Type of Customizations

- Customizing the Microsoft Dynamics 365 schema (database)
 - Includes adding, modifying, renaming and deleting entities and attributes
 - An entity is a definition for the type of record used to store information in Microsoft Dynamics 365
 - Microsoft Dynamics 365 includes a standard set of system entities such as Account, Contact, Opportunity and Case
- Customizing entities using the application's built-in customization tools can include:
 - Adding completely new custom entities to meet the requirements of the organization
 - Adding or removing attributes from existing entities
 - Creating relationships and mapping between entities



Customizing Forms


- Forms are used to enter data for given entity
- Form customizations typically include:
 - Modify an existing form to add new tabs, sections, and fields
 - Rearrange each of these items to simplify the way users view and enter data
 - Remove any of these items
 - Modify field properties such as labels and layout options

The screenshot displays the Microsoft Dynamics CRM Form Designer interface. The top ribbon includes tabs for FILE, HOME, and INSERT. The HOME tab is active, showing various toolbars for editing (Save, Save As, Save and Close, Publish, Change Properties, Remove, Undo, Redo), selecting (Body, Header, Footer, Navigation), and form management (Business Rules, Form Properties, Preview, Enable Security Roles, Show Dependencies, Managed Properties, Merge Forms, Upgrade). The left pane shows the 'Opportunity' entity with a tree view containing Summary, Product Line Items, and Quotes. Below this, a list of form sections is shown: Common (Documents, Products, Activities, Documents, Connections, Audit History, Events), Sales, Service, Marketing, and Processes. The main workspace is titled 'Solution: Default Solution' and 'Form: Opportunity'. It is divided into three panes: Opportunity Information (containing fields like Topic, Contact, Account, Purchase Timeframe, Currency, Budget Amount, Purchase Process, and Description), Opportunity Details (containing a Spacer, Current Situation, and Customer Need), and a right-hand pane with sections for STAKEHOLDER, SALES TEAM, and COMPETITOR. The right-hand pane also includes a Filter dropdown set to 'All Fields' and a checkbox for 'Only show unused fields'. A list of fields is displayed, including Actual Close Date, Actual Revenue, Actual Revenue (Base), Bar Service, Budget, Budget Amount (Base), Complete Internal Review, Confirm Interest, Created By, Created By (Delegate), Created On, Customer Pain Points, Date of Event, Decide Go/No-Go, Decision Maker?, Develop Proposal, Est. Close Date, Est. Revenue, Est. Revenue (Base), and Evaluate Fit. A 'New Field' button is at the bottom right.



Customizing Views

- Views are type of saved query that returns lists of records for a given entity that meet a certain criteria
- View customizations typically include:
 - Modify fields displayed and where they are displayed on the view
 - Modify filter criteria used to select records to display
 - Change sorting rules
 - Modify column width for each field

 **View: Opportunity Advanced Find View**

Working on solution: Default Solution

Topic ▲	Potential Customer	Est. Revenue	Status Re
View results are displayed here.			

Common Tasks

- ← →
- View Properties
- Edit Filter Criteria
- Configure Sorting
- Add Columns
- Change Properties
- Remove



Charts and Visualizations

Customizing Charts

- Chat customization typically include:

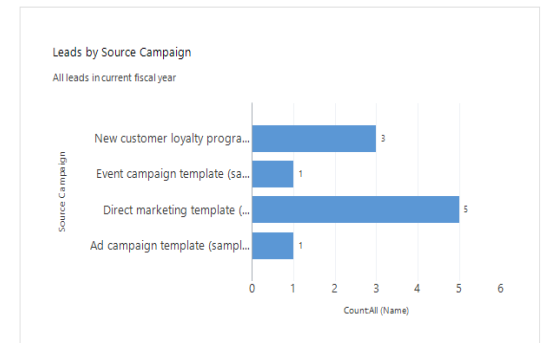
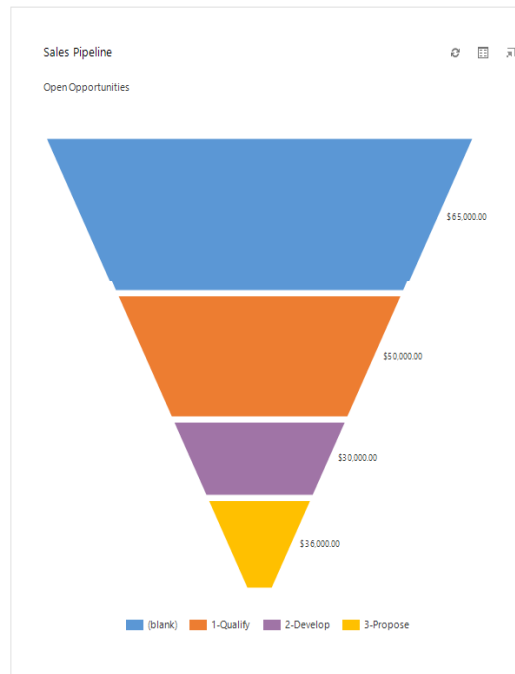
- Series field and aggregate method
- Category field and date groupings

Dashboards

- Groups lists, charts, etc. into single view
- Access can be controlled through security roles

SAVE AS NEW SET AS DEFAULT REFRESH ALL ADVANCED FIND

Microsoft Dynamics CRM Overview



My Activities

Search for records			
Activity Type	Subject	Regarding	Priority
Task	Send Welcome Gift	Jane Doe	Normal
Task	Evaluation Plan agreed upon (sample)		Normal
Phone Call	Likes some of our new products (sample)		High
Phone Call	availability of Product catalogs (sample)		High
Phone Call	Call the customer with relevant information (sample)	Average or...	High
Phone Call	Call back to understand the problem (sample)	Complete o...	High
Task	Ask Regional Manager to Call Back (sample)	Maintenanc...	High
Phone Call	Call back to understand the problem (sample)	Missing par...	Low

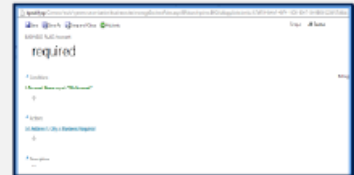


Process And Automation



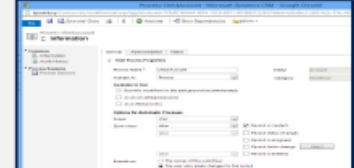
Process Flows

Business processes that span entities



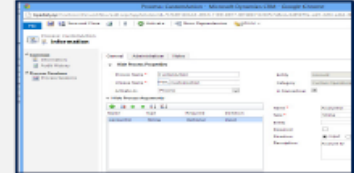
Business Rule

Easy client-side, rule writing capability (across browsers and mobile devices) for business analysts



Workflows

Automations that can run in the background or as part of user action and provide real-time feedback to end users



Custom Actions

Allow transactional custom API calls such as: “Escalate Case” or “Send Pothole Report, can be executed by workflow actions





Using Solutions to Package and Deploy

- Advantages to using your own solution include:
 - Work smaller set of components instead of everything at once
 - Organize selected components to deploy related changes together
 - Exported solutions zip file will be smaller
 - Keep exported solutions for change management

Templates

- Email
- Contact
- KB Article
- Mail Merge

Schema

- Entity
- Fields
- Relationship
- Option sets

User Interface

- Forms
- Views
- Charts
- Dashboards
- SiteMap
- Ribbons

Process/Steps/ Code

- Workflows
- Dialog
- Business Process Flows
- Business Rules
- Actions
- Web Resources
- Plug ins

Miscellaneous

- Security Roles
- Field Security Profiles
- Connection Roles
- Reports
- Solution Publisher



Extending Dynamics 365

- Developers can customize and extend Microsoft Dynamics 365 functionality by:
 - Using the product's built in customization tools
 - Programming application events in the Microsoft Dynamics 365 forms
 - Creating customized .NET solutions supported by Microsoft Dynamics 365 Software Development Kit (SDK)



Module Review

- Dynamics 365platform provides a set of specific APIs that handle interaction with the database and provides the building blocks for the application
- The Dynamic 365 application provides the tools to perform “supported” customizations directly from within the user interface
- You are not allowed to modify the database directly



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