



Microsoft Dynamics 365 Customization and Configuration Training Curriculum

— STRUCTURE —



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“Our MS 365 certification training makes sure that you are way ahead of your colleagues. So, hurry up and enroll today to work smartly.”

About Croma Campus:

Croma Campus Training & Development Private Limited is an education platform since 2010 providing rigorous industry-relevant programs designed and delivered in collaboration with world-class faculty and industry.

- Hands-On Live Projects
- Simulation Test Papers
- Industry Cases Studies
- 61,640+ Satisfied Learners
- 140+ Training Courses
- 100% Certification Passing Rate
- Live Instructor Classroom / Online Training
- 100% Placement Assistance

Course Objectives:

- Understand the features and tools that exist in Microsoft Dynamics 365 Customer Engagement
- Be able to customize and configure the out of the box Apps and Hubs in Microsoft Dynamics 365, including the Sales and Customer Service Apps
- Create a custom model driven Unified Client Interface (UCI) App using the App Designer and Site Map Designer
- Be aware of integrating complimenting Microsoft products such as SharePoint, Skype for Business, Exchange and OneNote
- Undertake and carry out the initial setup and configuration required in a Microsoft Dynamics 365 deployment
- Configure Auditing in Dynamics 365 and the Office 365 Security and Compliance Center
- Design and configure a comprehensive Security model using the inbuilt tools in Microsoft Dynamics 365
- Create a custom Dynamics 365 model including custom Entities, Fields and Relationships
- Understand the concept of Virtual Entities to integrate external data in Dynamics 365
- Design custom Forms, Quick View Forms, Quick Create Forms and Card Forms
- Create custom System Views, Personal Views and Public Views
- Understand the differences when customizing the Web, UCI and Outlook interfaces
- 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.

Course Description:

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

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 business process flows, create custom business apps and use solutions to package and deploy customizations across multiple Dynamics 365 environments.

The course applies to Microsoft Dynamics 365 Customer Engagement Version 9. (Online and On-premise deployments)..

Croma Campus Training Program Deliverables:

- **Session Recordings** - Original Class Room Voice & Video Recording
- **Training Material** - Soft Copy Handbooks
- **Assignments** | Multiple Hands-on Exercises
- **Test Papers** - We provide **Practice Test** as part of our course to help you prepare for the actual certification exam.
- **Live Case Studies**
- **Live Projects** - Hands-on exercises and Project work. You will work on real time industry-oriented projects and assignments for each module to practice.
- **Key focus on Hands-on exercises and Project work.** You will work on real time industry-oriented projects.
- Faculty with more than **10+ Years of Experience** in the Industry.
- **Technical Resume Designing & Job Assistance:** With more than 100+ Clients across the Globe and we help learners to get a good job in their respective field. We also help learners with resume preparation.
- **Interview Q&A**
- **About Croma Campus Training Certificate:** Croma Campus will provide you with an industry-recognized (Certified by **ISO 9001:2015** & **E-Cell IIT Jodhpur**) course completion certificate which has lifelong validity.
- **How I Unlock my Croma Campus Certificate:** Attend Complete Batch & Submit at least One Completed Project.

Course Content:

Module 1: Introduction

- Getting familiar with the versions of Microsoft Dynamics 365
- Get acquainted with the Dynamics 365 framework
- Review the Dynamics 365 Devices, Apps and Hubs
- Understand the tools for Dynamics 365 customizers
- A brief overview of Solutions
- Understand the differences between Dynamics 365 organizations and environments
- Review further reading and resources
- Set up the lab environment

Module 2: Initial Setup and Configuration

- An introduction to Dynamics 365 Admin Center
- An introduction to Dynamics 365 Deployment Manager
- An introduction to the Power Platform Admin Center
- 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
- Understand how to configure OneNote Integration
- Understand how to configure Auditing

Module 3: Security

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

Module 4: Creating and Managing Entities

- Introduction to the Dynamics 365 model
- Review the different Entity Types
- Create new Custom Entities
- Managing Entity Ownership
- Managing Entity Properties
- Custom Entity Security
- Virtual Entities
- Review Entities and Solutions

Module 5: 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

Module 6: Customizing Relationships and Mappings

- 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

Module 7: 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, Quick Create and Card Forms
- Configure Form Security
- Review the different View types
- Customizing System Views
- Configure the Editable Grid
- Customizing System Charts and Dashboards

Module 8: The Unified Client Interface (UCI)

- Introduction to the UCI
- The App Designer
- Using the Sitemap Designer
- Configuring UCI Apps
- Managing Apps in Solutions

Module 9: Processes: Workflows, Business Process Flows and Custom Actions

- 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

Module 10: 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?

Module 11: Placement Guide

- Tips to clear an Interview
- Common Interview questions and answers
- Microsoft Dynamics 365 Customization and Configuration Interview Questions
- Resume Building Guide
- Career roadmap and certifications
- Attempt for the Global Certification Exam
- Start applying for Jobs