

**Microsoft Dynamics 365 Customization and Configuration (MCC-55242)**

**Course Number:** MCC-55242  
**Duration:** 3 days

**Overview**

This Microsoft Community Course 55242, Microsoft Dynamics 365 Customization and Configuration training, teaches attendees how to set up, customize, configure and maintain the CRM components of Microsoft Dynamics 365.

Attendees 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. Students also gain an understanding of the Dynamics 365 security model.

**Prerequisites**

Before attending this course, students must have a working knowledge of Microsoft Dynamics 365 or Microsoft Dynamics CRM.

**Materials**

All Microsoft training students receive Microsoft official courseware.

**Software Needed on Each Student PC**

Attendees will not need to install any software on their computers for this class. The class will be conducted in a remote environment that Accelebrate will provide; students will only need a local computer with a web browser and a stable Internet connection. Any recent version of Microsoft Edge, Mozilla Firefox, or Google Chrome will work well.

**Objectives**

* 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

**Outline**

* Introduction
  + Be 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 organizations 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
* Processes: 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
* Conclusion