Customization In Microsoft Dynamics 365 for Sales and Customer Service

Module 1: Introduction to Customizing Dynamics 365

- Dynamics 365 Customization Overview
- Different types of Dynamics 365 clients
- Overview of Dynamics 365 architecture
- Understanding different types of customization methodologies
- Different types of customizations options
- Packaging and deploying customizations
- Extending Dynamics 365 Overview

Module 2: Introduction to Dynamics 365 Solution

- Dynamics 365 solutions overview
- Including components in solutions
- Solution publishers and versioning
- Understanding different types of solutions
- Working with multiple solutions
- Exporting and importing solutions

Module 3: Dynamics 365 Entity and Field Customization

- Dynamics 365 entities overview
- Defining entity ownership
- Working with entity properties
- System vs. Custom entities
- Dynamics 365 fields overview
- Working with different types of fields

Module 4: Additional Field Customizations

- Using calculated and rollup fields
- Working with local and global option sets

- Using alternate keys to facilitate data integration
- Dynamics 365 field level security
- State and status reason transitions

Module 5: Relationships

- Overview of relationships in Dynamics 365
- 1:N and N:N relationships
- Working with hierarchical data
- Using Entity mapping
- Connections and connection roles

Module 6: Customizing Forms

- Dynamics 365 form types
- How to build dynamics 365 forms
- Specialized form components
- Using access teams and sub-grids for record sharing
- Specialized form components
- Working with multiple forms

Module 7: Business Rules

- Business rules overview
- Business rule structure and design
- Using conditions and actions

Module 8: Views and Visualizations

- Types of views in Dynamics 365
- Creating and customizing views
- Customizing charts
- Customizing dashboards
- Using dynamics 365 theming

Module 9: Interactive Service Hub

- Interactive Service Hub Overview
- Dashboard and Form Basics
- Customization Overview
- Form Customization
- Dashboard Customization

Module 10: Mobile Considerations

- Examine Considerations when deploying the mobile client
- Explore strategies for customizing the mobile client
- Navigation and Form Considerations