

# MICROSOFT DYNAMICS 365 CUSTOMIZATION AND CONFIGURATION FOR POWER PLATFORM (M55242)

Course Code: 6729

You will learn setting up, customizing, configuring and maintaining the components of Microsoft Dynamics 365 Customer Engagement.

This course provides students with a detailed hands-on experience of setting up, customizing, configuring and maintaining Microsoft Dynamics 365 Customer Engagement (CRM) Apps and Model-driven Apps using the Power Apps Maker Portal and the Power Platform Admin Center.

## What You'll Learn

- Understand the features and tools that exist in Microsoft Dynamics 365 Customer Engagement (CRM) and the Power Platform
- Be able to customize and configure the out of the box Apps in Microsoft Dynamics 365 Customer Engagement, including the Sales and Customer Service Apps
- Create custom Microsoft Dynamics 365 Model-driven Apps using the Power Apps Maker Portal
- Be proficient using the Power Apps Make Portal and the Power Platform Admin Center
- Understand the differences between Environments and Solutions
- Integrate SharePoint, Teams and Outlook with Microsoft Dynamics 365 Customer Engagement Apps
- Undertake and carry out setup and configuration required to deploy and support Microsoft Dynamics 365 Customer Engagement Apps in an organization through the Power Platform Admin Center
- Configure Auditing in Power Platform Environment Settings
- Design and configure a comprehensive Security model using the inbuilt tools in the Power Platform Admin Center
- Create Model customizations in the Common Data Service (CDS) including custom Entities, Fields and Relationships
- Design custom Forms, Quick View Forms, Quick Create Forms and Card Forms using the Power Apps Maker Portal
- Create Custom Views using the Power Apps Maker Portal
- Create custom Charts and Dashboards using the Power Apps Maker Portal
- Create and manage Business Rules using the Business Rule Designer

- Plan, design and implement business process automation with Workflows, Business Process Flows and Power Automate Flows
- Understand the necessary best practices when creating customizations for Microsoft Dynamics 365 Customer Engagement, Power Apps and the Power Platform
- Be able to apply best practice methodology using unmanaged and managed Solutions to manage customizations across multiple Power Platform Environments

Attendees of this course will gain an in-depth understanding of configuring Environments through the Power Platform Admin Center, set up and maintaining Security, learn how to customize the Sales and Customer Service Apps, create custom Model-driven Apps using the Power Apps Maker Portal, make model customizations to the Common Data Service, create and maintain Workflows and Power Automate Flows, and manage changes using Solutions to package and deploy customizations across multiple Environments.

By the end of this 3 day course, attendees will know how to design, create, customize and support business solutions and apps built on Microsoft Dynamics 365 Customer Engagement (CRM) and the Power Platform.

### Who Needs to Attend

This course is intended for Information workers, IT Professionals and Developers. Students should have an existing working knowledge of Microsoft Dynamics 365 and the Power Platform. As a minimum, students should attend the prerequisite course '55250: Introduction to Microsoft Dynamics 365'.

### Prerequisites

A working knowledge of Microsoft Dynamics 365 Customer Engagement and Microsoft Power Apps would be advantageous but not essential.

# MICROSOFT DYNAMICS 365 CUSTOMIZATION AND CONFIGURATION FOR POWER PLATFORM (M55242)

Course Code: 6729

CLASSROOM LIVE

\$2,095 CAD

3 Day

## Classroom Live Outline

### Module 1: Introduction

This module provides the attendee with an introduction to the concept of creating custom Apps for Microsoft Dynamics 365 Customer Engagement. The concept of the Power Platform and Power Apps is presented, together with an initial overview of the Power Apps Maker portal and the Power Platform Admin Center.

### Lessons

- Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
- The Microsoft Power Platform
- The Power Apps Maker Portal
- The Power Platform Admin Center
- Power Platform Environments
- Solutions Overview
- As introduction to Release Wave Updates
- Review further reading and resources
- Labs - Acme Enterprises Event Management Solution

After completing this module, students will be able to:

- Be familiar with the concept of Microsoft Dynamics 365 Customer Engagement Customization and Configuration
- Understand the technologies that make up the Microsoft Power Platform
- Understand the features of the Power Apps Maker Portal
- Understand the features of the Power Platform Admin Center
- Be introduced to the Common Data Service (CDS)
- Be aware of the differences between Model-driven Apps and Canvas Apps
- Be introduced to some of the inbuilt tools for App Makers and Citizen Developers

- Understand the differences between Environments and Solutions
- Be aware of Release Wave Updates

## **Module 2: Setup and Configuration**

This module presents some of the most common features and areas that require configuration when provisioning and managing Dynamics 365 Apps and Power Platform Environments. This module guides you through the different portals and interfaces as well as common configuration Environmental Settings.

### **Lessons**

- The Microsoft 365 Admin Center
- The Power Platform Admin Center
- The Dynamics 365 Admin Center
- The Power Apps Maker Portal
- Dynamics 365 Classic
- Microsoft Power Automate
- Microsoft Power BI
- Environment Level Settings
- Format Settings
- Email Settings
- Skype and Teams Integration
- SharePoint Integration

After completing this module, students will be able to:

- Understand where to configure Users, Security and Licenses
- Understand the different admin interfaces and portals in the Microsoft Power Platform
- Work with the Power Platform Admin Center
- Be able to configure Environment Settings
- Be aware of integration with SharePoint, Skype, Teams and Outlook
- Configure Auditing

## **Module 3: Security**

This module highlights the importance of maintaining a robust security model in Microsoft Dynamics 365 by stepping through how to configure Business Units, Security Roles, Users and Teams. Access Teams and Hierarchy Security are also considered.

### **Lessons**

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

After completing this module, students will be able to:

- Manage Security in Power Platform Environments

- Configure Business Units, Security Roles, Access Levels, Users and Teams
- Know the difference between Teams and Access Teams
- Configure Manager and Position Hierarchy Security

#### **Module 4: Creating and Managing Entities**

In this module we will start to look at customizing the data model of the Common Data Service (CDS) to build custom apps in Microsoft Dynamics 365. The model consists of Entities, Relationships and Fields which can be customized and extended using the Power Apps Maker portal. This module serves as an introduction to the Data Modelling, including customizing Entities and configuring Entity properties.

##### **Lessons**

- Introduction to the Data Modelling
- System and Custom Entities
- Create new Custom Entities
- Entity Properties
- Entity Type and Ownership
- Custom Entity Security
- Entities and Solutions

After completing this module:

- Understand Common Data Service and modelling fundamentals
- Know the different Entity Types
- The process to create new Custom Entities
- Manage Entity Properties
- Configure Entity Security
- Manage Entity customizations with Solutions

#### **Module 5: Customizing Fields**

Fields are used in Dynamics 365 Apps to capture data entered by the user. The Common Data Services (CDS) supports a number of different Field data types and formats, all of which are presented in this module. Special Field types such as Calculated Fields are also considered, as well as securing data using Field Level Security.

##### **Lessons**

- Introduction to Field
- Understand the different Field Types
- Create a new Field
- Fields and Solutions
- Implement a Calculated Field
- Configure Field Level Security

After completing this module:

- Understand the process to customize Fields in the Common Data Service
- Know the different Field Types and Formats
- Be able to manage Field customizations using Solutions

- Create a Calculated Field
- Configure Field Level Security
- Use the Business Rule Designer to configure Field validation

## **Module 6: Customizing Relationships and Mappings**

Relationships associate an Entity with another Entity. This module provides an overview of the different types of Relationships that can be created in the Common Data Services. We also look at Relationship Mappings and how they can be used to pass values between related Entities to reduce duplicate data entry.

### **Lessons**

- Introduction to Relationships
- Relationship Types
- Create a Relationship
- Relationships and Solutions
- Understand Relationship Behavior
- Implement a Hierarchy Relationship
- Configure Field Mappings

After completing this module:

- Understand the different Relationship Types
- Be able to create a 1 to Many and Many to Many Relationship
- Know how to manage Relationship customizations using Solutions
- Understand how to configure Relationship Behaviour
- Know how to create a Hierarchical Relationships
- Be able to configure Field Mappings

## **Module 7: Customizing Forms, Views and Visualizations**

In this module you will learn how to customize and create the different Form types that exist in Dynamics 365 Model-driven Apps, as well as control access to forms using Form Level Security. The process to configure the different View types is also presented, as well as creating custom Charts and Dashboards.

### **Lessons**

- Creating a new Form
- Form types
- Using the Form Designer
- Customizing the Main, Card, Quick View and Quick Create Forms
- Configure Form Security
- Review the different View types
- Customizing Views
- Customizing Charts and Dashboards

After completing this module:

- Know the various Form Types for Model-driven Apps
- Be able to customize existing Forms and create new custom Forms
- Configure Form Security

- Be able to customize Views and create new custom Views
- Be able to customize Charts and create new custom Charts
- Be able to customize Dashboards and create new custom Dashboards

### **Module 8: Model-driven Apps**

This module looks at Model-driven apps in the Power Apps Maker Portal, including using the App Designer to create and customize Apps for Microsoft Dynamics 365 Customer Engagement.

#### **Lessons**

- Introduction to Model-driven Apps
- The App Designer
- Using the Sitemap Designer
- Configuring Apps

After completing this module, students will be able to:

- Navigate the Power Apps Maker Portal to create and customize Dynamics 365 Apps
- Create Model driven apps using the App Designer
- Customize App navigation using the Site Map Designer
- Enable security for Apps

### **Module 9: Processes: Workflows, Business Process Flows and Power Automate**

In this module you will learn how to create and maintain Workflows, Business Process Flows and Flows in Microsoft Power Automate.

#### **Lessons**

- Introduction to Processes
- Workflow
- Business Process Flows
- Building Flows in Power Automate

After completing this module, Students will be able to:

- Author Processes and Workflows
- Create Business Process Flows in Power Automate for Model-driven Dynamics 365 Apps
- Create Trigger Flows in Power Automate for Model-driven Dynamics 365 Apps
- Apply best practice when designing and implementing business process automation

### **Module 10: Solution Management**

In this module you will learn how to create and manage Solutions in in the Power Apps Maker Portal. Solutions act as a container for your customizations, allowing you to easily package, distribute and deploy changes across multiple Environments.

#### **Lessons**

- An introduction to Solution Management
- How to add and administer components in a Solution

- The differences between unmanaged and managed Solutions
- Solution Layers
- 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

After completing this module, Student will be able to:

- Understand Solution principals in Power Platform Environments
- Add and update Solution Components
- Know the difference between Managed and Unmanaged Solutions
- Understand the Export and Import process
- Know how to apply Managed Properties

**Know how to manage Solution releases using 'Clone as Patch' and 'Clone as Solution' .**

## Classroom Live Labs

### **Module 1: Introduction**

#### **Lab 1: Setting up your Lab environment**

- Setup your Lab and install sample data

### **Module 2: Setup and Configuration**

#### **Lab 1: Configure Environment Settings**

- Configure Environment Settings
- Configure Formatting Settings

#### **Lab 2: Configure Audit Settings**

- Enable Auditing
- Enable Auditing for an Entity
- Configure Auditing for a Field

### **Module 3: Security**

#### **Lab 1: Configure Users, Business Units, Security Roles and Access Levels**

- Create new Users in Microsoft 365
- Add Users to an Environment and assign Security Roles
- Create new Business Units
- Copy a Security Role and Configure Access Levels
- Assign Users to Security Roles

### **Module 4: Creating and Managing Entities**

#### **Lab 1: Creating and Managing Entities**

- Creating a Solution
- Creating Custom Entities
- Add existing System Entities to a Solution

- Configure permissions for Custom Entities

## Create a Model-driven App Module 5: Customizing Fields

### **Lab 1: Creating and Managing Fields**

- Creating Fields
- Create a Global Option Set

### **Lab 2: Creating a Calculated Field**

- Creating a Calculated Field
- Add Fields to an Entity Form

### **Lab 3: Configuring Field Level Security**

- Enable a Field for Field Level Security
- Configure a Field Security Profile

## **Module 6: Customizing Relationships and Mappings**

### **Lab 1: Create Entity Relationships**

- Create a 1 to Many Relationship

### **Lab 2: Create a Hierarchical Relationship**

- Configure a Hierarchical Relationship

### **Lab 3: Configure Field Mappings**

- Configure Field Mappings

## **Module 7: Customizing Forms, Views and Visualizations**

### **Lab 1: Customizing Forms**

- Customizing Forms
- Create a Quick Create Form
- Embed a Quick View Form

### **Lab 2: Configuring System Views**

- Create Custom Views

### **Lab 3: Configuring Charts and Dashboards**

- Configure Charts
- Construct a Dashboard

## **Module 8: Model-driven Apps**

- Lab 1: The App Designer Use the App Designer to create and customize Model-driven Apps

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

### **Lab 1: Create a Workflow**

- Create a Workflow
- Define when a Workflow Starts
- Adding Workflow Steps
- Activating a Workflow

## **Lab 2: Create a Business Process Flow**

- Create a Business Process Flow
- Add Stages to a Business Process Flow
- Add Data and Action Steps to a Business Process Flow
- Configure Branching Logic in a Business Process Flow

## **Lab 3: Building Flows in Power Automate**

- Navigate to the Power Automate Center
- Build a Flow using Actions and Formula
- Use 'My Flows' to Test and Diagnose issues

## **Module 10: Solution Management**

### **Lab 1: Solution Management**

- Export an Unmanaged Solution
- Import an Unmanaged Solution
- Configuring Managed Properties
- Export and Import Managed Solutions
- Create a Solution Patch
- Clone a Solution

# MICROSOFT DYNAMICS 365 CUSTOMIZATION AND CONFIGURATION FOR POWER PLATFORM (M55242)

Course Code: 6729

VIRTUAL CLASSROOM LIVE

\$2,095 CAD

3 Day

## Virtual Classroom Live Outline

### Module 1: Introduction

This module provides the attendee with an introduction to the concept of creating custom Apps for Microsoft Dynamics 365 Customer Engagement. The concept of the Power Platform and Power Apps is presented, together with an initial overview of the Power Apps Maker portal and the Power Platform Admin Center.

### Lessons

- Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
- The Microsoft Power Platform
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- Power Platform Environments
- Solutions Overview
- As introduction to Release Wave Updates
- Review further reading and resources
- Labs - Acme Enterprises Event Management Solution

After completing this module, students will be able to:

- Be familiar with the concept of Microsoft Dynamics 365 Customer Engagement Customization and Configuration
- Understand the technologies that make up the Microsoft Power Platform
- Understand the features of the Power Apps Maker Portal
- Understand the features of the Power Platform Admin Center
- Be introduced to the Common Data Service (CDS)
- Be aware of the differences between Model-driven Apps and Canvas Apps
- Be introduced to some of the inbuilt tools for App Makers and Citizen Developers

- Understand the differences between Environments and Solutions
- Be aware of Release Wave Updates

## **Module 2: Setup and Configuration**

This module presents some of the most common features and areas that require configuration when provisioning and managing Dynamics 365 Apps and Power Platform Environments. This module guides you through the different portals and interfaces as well as common configuration Environmental Settings.

### **Lessons**

- The Microsoft 365 Admin Center
- The Power Platform Admin Center
- The Dynamics 365 Admin Center
- The Power Apps Maker Portal
- Dynamics 365 Classic
- Microsoft Power Automate
- Microsoft Power BI
- Environment Level Settings
- Format Settings
- Email Settings
- Skype and Teams Integration
- SharePoint Integration

After completing this module, students will be able to:

- Understand where to configure Users, Security and Licenses
- Understand the different admin interfaces and portals in the Microsoft Power Platform
- Work with the Power Platform Admin Center
- Be able to configure Environment Settings
- Be aware of integration with SharePoint, Skype, Teams and Outlook
- Configure Auditing

## **Module 3: Security**

This module highlights the importance of maintaining a robust security model in Microsoft Dynamics 365 by stepping through how to configure Business Units, Security Roles, Users and Teams. Access Teams and Hierarchy Security are also considered.

### **Lessons**

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

After completing this module, students will be able to:

- Manage Security in Power Platform Environments

- Configure Business Units, Security Roles, Access Levels, Users and Teams
- Know the difference between Teams and Access Teams
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#### **Module 4: Creating and Managing Entities**

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##### **Lessons**

- Introduction to the Data Modelling
- System and Custom Entities
- Create new Custom Entities
- Entity Properties
- Entity Type and Ownership
- Custom Entity Security
- Entities and Solutions

After completing this module:

- Understand Common Data Service and modelling fundamentals
- Know the different Entity Types
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- Manage Entity Properties
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##### **Lessons**

- Introduction to Field
- Understand the different Field Types
- Create a new Field
- Fields and Solutions
- Implement a Calculated Field
- Configure Field Level Security

After completing this module:

- Understand the process to customize Fields in the Common Data Service
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- Configure Field Level Security
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### **Lessons**

- Introduction to Relationships
- Relationship Types
- Create a Relationship
- Relationships and Solutions
- Understand Relationship Behavior
- Implement a Hierarchy Relationship
- Configure Field Mappings

After completing this module:

- Understand the different Relationship Types
- Be able to create a 1 to Many and Many to Many Relationship
- Know how to manage Relationship customizations using Solutions
- Understand how to configure Relationship Behaviour
- Know how to create a Hierarchical Relationships
- Be able to configure Field Mappings

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In this module you will learn how to customize and create the different Form types that exist in Dynamics 365 Model-driven Apps, as well as control access to forms using Form Level Security. The process to configure the different View types is also presented, as well as creating custom Charts and Dashboards.

### **Lessons**

- Creating a new Form
- Form types
- Using the Form Designer
- Customizing the Main, Card, Quick View and Quick Create Forms
- Configure Form Security
- Review the different View types
- Customizing Views
- Customizing Charts and Dashboards

After completing this module:

- Know the various Form Types for Model-driven Apps
- Be able to customize existing Forms and create new custom Forms
- Configure Form Security

- Be able to customize Views and create new custom Views
- Be able to customize Charts and create new custom Charts
- Be able to customize Dashboards and create new custom Dashboards

### **Module 8: Model-driven Apps**

This module looks at Model-driven apps in the Power Apps Maker Portal, including using the App Designer to create and customize Apps for Microsoft Dynamics 365 Customer Engagement.

#### **Lessons**

- Introduction to Model-driven Apps
- The App Designer
- Using the Sitemap Designer
- Configuring Apps

After completing this module, students will be able to:

- Navigate the Power Apps Maker Portal to create and customize Dynamics 365 Apps
- Create Model driven apps using the App Designer
- Customize App navigation using the Site Map Designer
- Enable security for Apps

### **Module 9: Processes: Workflows, Business Process Flows and Power Automate**

In this module you will learn how to create and maintain Workflows, Business Process Flows and Flows in Microsoft Power Automate.

#### **Lessons**

- Introduction to Processes
- Workflow
- Business Process Flows
- Building Flows in Power Automate

After completing this module, Students will be able to:

- Author Processes and Workflows
- Create Business Process Flows in Power Automate for Model-driven Dynamics 365 Apps
- Create Trigger Flows in Power Automate for Model-driven Dynamics 365 Apps
- Apply best practice when designing and implementing business process automation

### **Module 10: Solution Management**

In this module you will learn how to create and manage Solutions in in the Power Apps Maker Portal. Solutions act as a container for your customizations, allowing you to easily package, distribute and deploy changes across multiple Environments.

#### **Lessons**

- An introduction to Solution Management
- How to add and administer components in a Solution

- The differences between unmanaged and managed Solutions
- Solution Layers
- 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

After completing this module, Student will be able to:

- Understand Solution principals in Power Platform Environments
- Add and update Solution Components
- Know the difference between Managed and Unmanaged Solutions
- Understand the Export and Import process
- Know how to apply Managed Properties

**Know how to manage Solution releases using 'Clone as Patch' and 'Clone as Solution' .**

Virtual Classroom Live Labs

### **Module 1: Introduction**

#### **Lab 1: Setting up your Lab environment**

- Setup your Lab and install sample data

### **Module 2: Setup and Configuration**

#### **Lab 1: Configure Environment Settings**

- Configure Environment Settings
- Configure Formatting Settings

#### **Lab 2: Configure Audit Settings**

- Enable Auditing
- Enable Auditing for an Entity
- Configure Auditing for a Field

### **Module 3: Security**

#### **Lab 1: Configure Users, Business Units, Security Roles and Access Levels**

- Create new Users in Microsoft 365
- Add Users to an Environment and assign Security Roles
- Create new Business Units
- Copy a Security Role and Configure Access Levels
- Assign Users to Security Roles

### **Module 4: Creating and Managing Entities**

#### **Lab 1: Creating and Managing Entities**

- Creating a Solution
- Creating Custom Entities
- Add existing System Entities to a Solution

- Configure permissions for Custom Entities

## Create a Model-driven App Module 5: Customizing Fields

### **Lab 1: Creating and Managing Fields**

- Creating Fields
- Create a Global Option Set

### **Lab 2: Creating a Calculated Field**

- Creating a Calculated Field
- Add Fields to an Entity Form

### **Lab 3: Configuring Field Level Security**

- Enable a Field for Field Level Security
- Configure a Field Security Profile

## **Module 6: Customizing Relationships and Mappings**

### **Lab 1: Create Entity Relationships**

- Create a 1 to Many Relationship

### **Lab 2: Create a Hierarchical Relationship**

- Configure a Hierarchical Relationship

### **Lab 3: Configure Field Mappings**

- Configure Field Mappings

## **Module 7: Customizing Forms, Views and Visualizations**

### **Lab 1: Customizing Forms**

- Customizing Forms
- Create a Quick Create Form
- Embed a Quick View Form

### **Lab 2: Configuring System Views**

- Create Custom Views

### **Lab 3: Configuring Charts and Dashboards**

- Configure Charts
- Construct a Dashboard

## **Module 8: Model-driven Apps**

- Lab 1: The App Designer Use the App Designer to create and customize Model-driven Apps

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

### **Lab 1: Create a Workflow**

- Create a Workflow
- Define when a Workflow Starts
- Adding Workflow Steps
- Activating a Workflow

## **Lab 2: Create a Business Process Flow**

- Create a Business Process Flow
- Add Stages to a Business Process Flow
- Add Data and Action Steps to a Business Process Flow
- Configure Branching Logic in a Business Process Flow

## **Lab 3: Building Flows in Power Automate**

- Navigate to the Power Automate Center
- Build a Flow using Actions and Formula
- Use 'My Flows' to Test and Diagnose issues

## **Module 10: Solution Management**

### **Lab 1: Solution Management**

- Export an Unmanaged Solution
- Import an Unmanaged Solution
- Configuring Managed Properties
- Export and Import Managed Solutions
- Create a Solution Patch
- Clone a Solution

Nov 30 - Dec 2, 2026 | 8:30 AM - 4:30 PM EST



# MICROSOFT DYNAMICS 365 CUSTOMIZATION AND CONFIGURATION FOR POWER PLATFORM (M55242)

Course Code: 6729

PRIVATE GROUP TRAINING

3 Day

Visit us at [www.globalknowledge.com](http://www.globalknowledge.com) or call us at 1-866-716-6688.

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