

# Microsoft Dynamics 365 Customisation

## Contents:

This is a practical workshop where delegates are provided with a basic new Instance to work on. The scenario is a course booking system, and you will be creating a related entity to the Course entity already set up, and will include the following functionality:

- Security Roles
- Creating Entities
- Entity Relationships
- Creating new fields
- Option Sets
- Global / 2 Option / Multiselect
- Calculated Fields
- Roll Up Fields
- Screen Layouts (Forms)
- Tabs and Sections
- Removing Objects
- Deleting fields
- Field Level Security
- Sub-Grids
- Quick View Forms
- Quick Create Forms
- Mapped Fields
- Processes – Workflow
  - Creating Workflow
  - Adding Steps & Stages
  - Create / Update Records
- Business Process Rules
  - Creating New Rules
  - Conditions & Actions
  - Recommendations
- Processes – Business Process Flow
  - Stages
  - Steps
  - Branches
  - Process Workflows
  - Enabling Security Roles
- Editable Grids

## Duration:

This course is scheduled to run from 10:00 – 16:00 with 1 hour for lunch plus morning and afternoon breaks.

## Course Aims:

This course is designed to give database administrators practical experience in customising their Microsoft Dynamics 365 v9 system.

## Pre-Requisites:

All delegates must have attended the Foundation and Advanced User courses or have an equivalent level of knowledge.

## Course Fees:

Courses are run as public courses in Milton Keynes or may be held as a one company courses on your premises for a maximum of 4 delegates.

Each delegate will receive a training manual to keep after the course.

## Training Environment:

You need to provide a suitable room with laptops/PCs and internet access and refreshments. Please see our Training Environment information sheet for full details of requirement.

## Software Version:

This course is designed for users of Microsoft Dynamics 365 v9 and differences may be found with earlier or later versions.

## How to book:

Phone us on **01908 929555** or email [rachel@crm-dynamics.co.uk](mailto:rachel@crm-dynamics.co.uk)