€TRAINING

Customize Microsoft Dynamics 365 for Finance and Operations Training

Customize Microsoft Dynamics 365 for Finance and Operations Training

Introduction:

In this comprehensive course, we will delve into the intricacies of customizing Microsoft Dynamics 365 for Finance and Operations to meet the unique needs of businesses. This course is designed to provide you with the skills and knowledge necessary to tailor this powerful business management solution to your organization's requirements.

Course Objectives:

At the end of this course the participants will be able to:

- Understand the core concepts of Microsoft Dynamics 365 for Finance and Operations customization.

- Learn how to create and modify data entities, forms, and reports.

- Explore advanced customization techniques such as workflows, business processes, and integrations.

- Master the art of designing and implementing custom security models.

- Gain proficiency in utilizing the development environment for customizations.

- Discover best practices for maintaining and upgrading customized solutions.

- Develop the ability to troubleshoot common customization issues.

Targeted Audience:

- IT professionals and developers

- Business analysts

- System administrators

- Consultants and solution architects

Course Outline:

Unit 1: Introduction to Dynamics 365 Customization

- Overview of customization options in Dynamics 365.

- Exploring the customization development environment.

- Introduction to Data Entities and their customization.

Unit 2: Customizing Forms and Views

- Designing and modifying entity forms using the Form Designer.

- Creating custom views and managing data presentation.

Unit 3: Customizing Reports and Dashboards

- Building custom reports using Power BI and SQL Server Reporting Services.

- Creating interactive dashboards for data visualization.

Unit 4: Workflow Automation

- Understanding workflows and their role in customization.

- Designing custom workflows to automate business processes.

Unit 5: Advanced Business Process Flows

- Creating and customizing complex business process flows.

- Integrating business process automation into Dynamics 365.

Unit 6: Integration and Data Import/Export

- Integrating Dynamics 365 with other systems using APIs.

- Importing and exporting data using Data Management tools.

Unit 7: Security and Access Control

- Managing security roles and permissions.

- Designing a custom security model to match business needs.

Unit 8: Solution Deployment and Versioning

- Packaging and deploying customizations across environments.

- Handling versioning and maintaining customized solutions.

Unit 9: Performance Optimization

- Techniques for optimizing customizations for better system performance.

- Identifying and addressing performance bottlenecks.

Unit 10: Troubleshooting and Best Practices

- Common customization issues and their solutions.

- Best practices for sustainable and efficient customizations.