€TRAINING

Dynamics 365 Customization Mastery

28 October -
1 November 2024
Kuala Lumpur (Malaysia)

Dynamics 365 Customization Mastery

REF: F2430 DATE: 28 October - 1 November 2024 Venue: Kuala Lumpur (Malaysia) - Fee: 5300 Euro

Introduction:

This comprehensive training program amalgamates Dynamics 365 customization within operational, CRM, finance, and budgetary contexts. It equips participants to tailor Dynamics 365 to specific business needs while optimizing processes across operational, customer-centric, financial, and budgetary spheres.

Program Objectives:

By the end of this program, participants will be able to:

- Understand Dynamics 365 customization concepts for various contexts.
- Master customization tools for tailored forms, views, and reports.
- Implement workflow automation across processes comprehensively.
- Develop proficiency in advanced business process flows and financial optimizations.
- Learn integration methodologies and data management tools.
- Gain expertise in designing custom security models and troubleshooting common issues.

Targeted Audience:

- Business analysts.
- CRM managers.
- Financial professionals.
- Operations managers.
- IT professionals.
- Consultants and developers.

Program Outlines:

Unit 1:

Introduction to Dynamics 365 Customization:

- Overview of customization options in Dynamics 365, encompassing operational, CRM, finance, and budgetary customization.

- Exploring the customization development environment tailored for these diverse functional aspects.
- Introduction to Data Entities customized for operational, CRM, finance, and budget-specific data management.

Customizing Forms, Views, and Data Presentation:

- Designing and modifying entity forms using the Form Designer for finance, budget, operational, and CRM interfaces.
- Creating custom views and managing data presentation optimized for these diverse functional processes.

Unit 2:

Customizing Reports, Dashboards, and Analytics:

- Building custom reports using Power BI and SQL Server Reporting Services, emphasizing financial analytics, operational insights, CRM metrics, and budgetary analysis.
- Creating interactive dashboards for holistic visualization encompassing financial, operational, CRM, and budget-centric insights.

Workflow Automation:

- Understanding workflows' role in streamlining financial processes, operational efficiency, CRM interactions, and budgetary approvals.
- Designing custom workflows to automate financial transactions, operational workflows, CRM-specific processes, and budgetary authorizations.

Unit 3:

Advanced Business Process Flows:

- Creating and customizing complex business process flows integrating financial controls, CRM-specific processes, operational checkpoints, and budgetary milestones.
- Integrating business process automation across financial, operational, CRM, and budget-related facets for comprehensive management.

Integration and Data Management:

- Integrating Dynamics 365 with other systems using APIs to ensure financial data accuracy, operational continuity, CRM synchronization, and budgetary alignment.

- Importing and exporting data using Data Management tools, accounting for financial, operational, CRM, and budget-specific data handling and integrity.

Unit 4:

Security, Access Control, and Data Protection:

- Managing security roles and permissions considering financial data confidentiality, operational access requirements, CRM data protection, and budgetary controls.
- Designing custom security models aligned with financial, operational, CRM, and budget-focused access needs.

Solution Deployment, Versioning, and Maintenance:

- Packaging and deploying customizations ensuring financial compliance, operational consistency, CRM functionality, and budgetary alignment across environments.
- Handling versioning and maintaining customized solutions for seamless financial, operational, CRM, and budget-centric experiences.

Unit 5:

Performance Optimization:

- Techniques for optimizing customizations to enhance performance in financial transactions, operational workflows, CRM interactions, and budgetary planning.
- Identifying and addressing performance bottlenecks specific to financial, operational, CRM, and budget-related functionalities.

Troubleshooting and Best Practices:

- Addressing common issues across finance, operations, CRM, and budgetary domains, providing solutions and best practices for sustainable and efficient implementations.