

CRM Citizen Developer for Dynamics 365

Course Level: 200

As Microsoft Dynamics 365 has evolved so has the business needs of an organization. With this evolution, the Dynamics 365 administrator skillset needs to evolve, but learning a coding language or hiring a developer isn't always an option to create, modify, and configure new business applications. This fast pace course is designed to bridge that gap while getting learners up to speed quickly on what's new with Dynamics 365, as well as a deep dive into advanced configuration, low code development, and runtime environments.

DYNAMICS 365
UNIVERSITY 



At A Glance: CRM Citizen Developer for Dynamics 365

Why Enroll?

Learn how admins, developers, and customizers can enhance the platform with low and no code solutions, including PowerApps and Flow.



Who to Enroll?

System Administrators -
Power Users -
Customizers -
Developers -



Key Takeaways

User Experience; Building a Good User Experience; Platform; Processes; Business Process Flows; Search Configuration; Solution and Environment Management; Business Application Platform Overview



Register

Register for a CRM Citizen Developer today!

[Click to Register.](#)

About this Training



Intended Audience

This training is intended for administrators and configurators who have completed Dynamics 365 University Boot Camp training – or equivalent experience – and desires to continue their technical education with Microsoft Dynamics 365. This course assumes working knowledge of skills outlined in the Boot Camp course. This course is designed to provide a deeper understanding of the advanced processes and low code platform options an attendee can leverage in Microsoft Dynamics 365.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Dynamics 365 University - Boot Camp or equivalent application experience

Key Takeaways

This Training Will Allow You To:

- Understand Microsoft Dynamics365 and what it offers
- Design and configure a smooth and efficient user experience
- Use Dynamics 365 App Designer for common scenarios
- Understand, use and configure the new Business Process Flows using the new Visual process designer
- Use the Editable Grid feature to replace the existing read only grids as needed
- Optimize your configuration for the mobile Apps
- Plan your solution management strategy
- Understand how and when to leverage PowerApps, Flow and the Common Data Model



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

DYNAMICS 365 USER EXPERIENCE

Clients

- Web
- Unified Client Interface
- Unified Service Desk
- Mobile
- App for Outlook

Editions

- Business
- Enterprise

Configuration Essentials

- Solutions overview
- Customization best practices
- Relationships

BUILDING A GOOD USER EXPERIENCE

Forms

- Evolution
- Types
- Best practices
 - Multiple forms
 - Performance
- Sub-grids and Charts
- Knowledge Management Integration
- Form navigation
- Form presentations and architecture
- UCI Forms

Views

- Best practices
- Read-only Grids
- Editable Grids

- Features, functionality and configuration
- Extending editable grids

Mobile

- Architecture
- Navigation
- Form best practices
- Custom controls
- Optimizing
- Limitations
- Offline configuration and Administration

App Modules

- Understanding the site map
- Multiple Site maps
- Dependencies
- Role/Task driven modules

- Security and access
- Properties for Dynamics 365 - Custom app

Themes

- Ribbon/Command Bar
- Ribbon Workbench

*Agenda is tentative and subject to changes based upon learner comprehension, instructor's discretion, and other factors.
Order, pace, content, and timeline subject to change.*

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DAY 1



DAY 2



DAY 3



DAY 4



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PLATFORM

Field Configuration

- Calculated fields
- Rollup fields
- Date fields
- Multi-select
- Timeline control

Alternate keys

Hierarchy configuration

- Rollup
- Security

PROCESSES

Business Rules

- Design
- Best Practices
- When to extend to JavaScript

Workflows

- Workflow Capabilities
- Background Workflows
- Workflow Structure
- Real-time Workflows
- Workflow Security
- Workflow Templates
- Workflow Best Practices

Process Actions

- Built-in Command Actions
- Create Simple Custom Actions
- Create Custom Actions with Arguments

Dialogs

- Purpose
- Basic Dialog
- Query CRM Data
- Child

Custom Workflow Activities

- Using Custom Workflow Activities
- Registering Custom Workflow Activities

Process Management

- Security for Processes
- Manage Processes



DAY 1



DAY 2



DAY 3



DAY 4



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BUSINESS PROCESS FLOWS

- Capabilities
- Design
- Business Process Flow Entities
- Enhance with Workflows
- Concurrency, Status and Duration
- Analytics
- Task Flows



DAY 1



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DAY 3



DAY 4



DAY 5

SEARCH CONFIGURATION

- Categorized Search**
- Relevance Search**
- Impact on View Design**
- Performance Considerations**

SOLUTION & ENVIRONMENT MANAGEMENT

Managed vs. Unmanaged

Development Cycle

- Merging Changes
- Unmanaged solutions interact
- Patching and Cloning

Processes and Solutions

Plug-ins and Solutions

Solution Structure

- Removing Entities or Attributes
- Changing Attribute Type
- Dependency Tracking and its impact
- Sharing of publishers

Managing the Environment

- Solution Movement
- Data movement
- Configuration Migration Tool

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BUSINESS APPLICATION PLATFORM OVERVIEW

PowerApps

- No code - Build web and mobile business applications
- Visual designer to compose pages
- Good choice for task focused internal applications
- Connectors for building cross-system apps
- Shared with internal users or organization wide
- Connect to services to access data
- Simple publish, runtime player hosts application

Microsoft Flow

- Build process automation that spans systems
- Visual designer to compose automations
- Connect to services to access data
- Dynamics 365 Workflows vs. Microsoft Flow

Power BI Integration

Common Data Service

- Scalable cloud data store
- Standard schema through a set of standardized entities

- Model is extending with custom entities and attributes
- Connectors for PowerApps and Microsoft Flow
- Built-in synchronization with Dynamics 365 and Office 365 in the near future

- Calculated Fields
- Rollup Fields

Global Option Sets Field Level Security

- Defined / Scope
- Configuring

DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED