€TRAINING

Customize Microsoft Dynamics 365 for Finance and Operations

3 - 14 February 2025
Paris (France)

Customize Microsoft Dynamics 365 for Finance and Operations

REF: F2337 DATE: 3 - 14 February 2025 Venue: Paris (France) - Fee: 10100 Euro

Introduction:

This training program delves into the advanced customization of Microsoft Dynamics 365 for Finance and Operations, equipping professionals with the skills to tailor the platform to meet specific business needs. It empowers participants to enhance functionality, streamline processes, and drive operational efficiency through effective customization.

Program Objectives:

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

- Understand the architecture and key components of Dynamics 365 for Finance and Operations.

- Customize forms, reports, and workflows to fit organizational requirements.

- Implement advanced data integration and automation techniques.

- Develop and deploy custom modules and extensions.

- Optimize system performance and maintain customizations effectively.

Targeted Audience:

- IT Professionals.

- ERP Consultants.

- System Administrators.

- Business Analysts.

- Developers working with Dynamics 365.

Program Outline:

Unit 1:

Introduction to Microsoft Dynamics 365 Architecture:

- Overview of Dynamics 365 for Finance and Operations.

- Understanding the platform's architecture and data model.

- Key modules and their functionalities.

- Introduction to customization tools and environments.

Unit 2:

Customizing Forms and User Interface:

- Creating and modifying forms to meet user needs.

- Customizing the user interface for enhanced usability.

- Using the form designer and X++ for advanced customizations.

- Best practices for managing user permissions and security roles.

- Examples of effective form customizations.

Unit 3:

Workflow Customization and Automation:

- Understanding Dynamics 365 workflows and their applications.

- Customizing and automating business processes using workflows.

- Implementing approval workflows and notifications.

- Integrating workflows with external systems and data sources.

Unit 4:

Report Customization and Data Analysis:

- Customizing standard reports and creating new reports.

- Using Power BI with Dynamics 365 for advanced analytics.

- Implementing real-time dashboards and KPI tracking.

- Techniques for optimizing report performance.

Unit 5:

Data Integration and Management:

- Understanding data entities and integration options.

- Importing and exporting data using Data Management Framework.

- Integrating Dynamics 365 with other systems CRM, HR, etc..

- Ensuring data integrity and consistency across systems.

Unit 6:

Developing Custom Modules and Extensions:

- Introduction to the development environment and tools.

- Creating custom modules using Visual Studio and X++.

- Extending existing modules and adding new functionalities.

- Deploying customizations across environments.

- Examples of custom modules developed for specific industries.

Unit 7:

Implementing Business Logic and Scripting:

- Writing and managing custom business logic in X++.

- Using event handlers and delegates for customization.

- Implementing custom business rules and validations.

- Debugging and testing custom code.

- Best practices for maintaining custom scripts.

Unit 8:

Security and Compliance in Customization:

- Managing security roles and permissions in customized environments.

- Ensuring compliance with organizational and regulatory standards.

- Implementing data protection and encryption measures.

- Auditing and monitoring customizations for security risks.

- Case studies on maintaining security in customized systems.

Unit 9:

Performance Optimization and Troubleshooting:

- Techniques for optimizing the performance of customized systems.

- Identifying and resolving common performance bottlenecks.

- Monitoring system performance and usage.

- Best practices for maintaining system stability and reliability.

- Examples of performance optimization in large-scale deployments.

Unit 10:

Maintenance and Upgrading Customizations:

- Strategies for maintaining customizations through updates and upgrades.

- Ensuring compatibility with new versions of Dynamics 365.

- Documenting and managing customizations effectively.

- Planning for future customization needs and scalability.