Microsoft Dynamics 365 Customization and Configuration for Power Platform (M55242)

Duration: 3 Days **Course Code: M55242** **Delivery Method: Closed Events**

Overview:

Learn how to customize, configure, and extend Microsoft Dynamics 365 and the Power Platform by building business applications, managing Dataverse data, automating processes, implementing security, and leveraging Copilot and AI-powered solutions.

This course gives attendees a detailed, hands-on grounding in setting up, customizing, configuring and maintaining Microsoft Dynamics 365 Customer Engagement Model-driven Apps, Canvas Apps and Power Pages sites inside the Microsoft Power Platform.
Attendees gain an in-depth understanding of building intelligent, AI-enabled business apps — using Copilot embedded directly in Dynamics 365, Copilot Studio agents, and Copilot across Power
Apps, Power Automate and Power BI — as well as the skills to support and govern a best-practice system using Solutions, Application Lifecycle Management, and the emerging discipline of MCP (Model Context Protocol)-connected AI tooling.
Every module builds on a single running scenario — a fictitious organization, Acme Enterprises — so the Tables, Apps, Processes, Copilot configuration and Power BI dashboards attendees build in one module are the same ones they extend, secure, deploy and support in the next.

Updated Nov. 2026

Company Events

These events can be delivered exclusively for your company at our locations or yours, specifically for your delegates and your needs. The Company Events can be tailored or standard course deliveries.

Target Audience:

This course is intended for information workers, IT professionals and developers. Students should have an existing working knowledge of Microsoft Dynamics 365 and the Power Platform. As a minimum, students should attend the prerequisite course 'Introduction to Microsoft Dynamics 365' or have equivalent experience.

Objectives:

- **After completing this course, students will be able to:**
- Understand the features and tools that exist in Microsoft Dynamics 365 Customer Engagement and the Power Platform
- Customize and configure intelligent business apps and solutions across Dynamics 365 Sales, Customer Service and Field Service
- Build Model-driven Apps, Canvas Apps and Power Pages sites — including generating them from a natural-language description using Copilot and Plan Designer
- Integrate Dynamics 365 with Microsoft 365, SharePoint, Power BI, Copilot Studio and the AI Builder
- Undertake the initial setup and configuration required in a Dynamics 365 deployment, including auditing and governance in the Power Platform Admin Center
- Design and configure a comprehensive, best-practice Security model
- Create a custom Dataverse data model, including custom Tables, Columns and Relationships
- Design custom Forms, Views, Charts and native Dashboards
- Connect Power BI Desktop to Dataverse, publish reports to the Power BI Service, and embed them natively into Dynamics 365 as Power BI Dashboards
- Use Claude, connected via the Dataverse MCP Server and Power BI's own MCP servers, to accelerate report and data-model development
- Configure and deploy Copilot in Dynamics 365 Sales, Customer Service and Field Service, including grounding it in custom data sources via MCP
- Build AI agents with Copilot Studio and apply the additional Application Lifecycle Management discipline they require across Development, Test and Production
- Create and manage Business Rules, Workflows, Business Process Flows and Power Automate Cloud Flows
- Package, deploy and govern changes using Solutions across multiple Power Platform environments
- Use Claude, connected via the Dataverse MCP Server, as a day-to-day support and administration tool for a live solution

Prerequisites:

Participants should have a basic understanding of business applications and general computer skills. Familiarity with Microsoft Dynamics 365, Power Platform concepts, or business process management is beneficial but not required.

Testing and Certification

None

Follow-on-Courses:

None

Content:

Module 1: Introduction

Orients attendees to Dynamics 365 and the Power Platform before any hands-on work begins — the Power Apps Maker Portal, the Power Platform Admin Center, and how Power Apps, Power Automate, Power BI, Copilot Studio and Dataverse fit together. Maps out where Copilot and the Model Context Protocol (MCP) are covered later in the course, and closes with an overview of environments, Solutions and the current Release Wave.

Lessons for Module 1:

- Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
- The Microsoft Power Platform
- The Power Apps Maker Portal
- The Power Platform Admin Center
- Copilot and Dynamics 365
- AI Builder and Dynamics 365
- Power Automate and Power BI in Dynamics 365
- Power Platform environments and Solutions overview
- Introduction to Release Wave updates

After completing module 1, students will be able to:

- Be familiar with the concept of Microsoft Dynamics 365 Customer Engagement customization and configuration
- Understand the technologies that make up the Microsoft Power Platform
- Understand the features of the Power Apps Maker Portal and the Power Platform Admin Center
- Be introduced to the Dataverse Common Data Model
- Distinguish between Model-driven Apps, Canvas Apps and Power Pages
- Understand the differences between Environments and Solutions
- Be aware of the current Release Wave and how Microsoft ships platform updates

Module 1 Hands-On Labs

- Lab 1.1: Setting Up Your Lab Environment — Sign in to your dedicated Acme Enterprises lab environment and take a first guided look at the Power Apps Maker Portal and the Power Platform Admin Center, ready for the hands-on work that continues in every module from here on.

Module 2: Administration and Governance

Module 5: Forms, Views and Visualizations

Covers native Dynamics 365 Forms, Views, Charts and classic Dashboards, then goes further into Interactive Experience Dashboards — real-time, filterable multi-stream and single-stream layouts with visual filters and live KPI tiles. Power BI is covered separately in the next module.

Lessons for Module 5:

- Form types, the Form Designer, and customizing Main, Quick View, Quick Create and Card Forms
- Form Security
- View types, customizing System Views, and the Editable Grid
- Customizing System Charts and classic System Dashboards
- Interactive Experience Dashboards — multi-stream and single-stream layouts
- Configuring visual filters, global filters and timeframe filters
- Security roles and solution-awareness for Interactive Experience Dashboards

After completing module 5, students will be able to:

- Know the various Form types in Dynamics 365 and customize or create new Forms
- Configure Form Security
- Customize Views and create new custom System Views
- Customize Charts and create new custom System Charts and classic Dashboards
- Build a multi-stream and a single-stream Interactive Experience Dashboard
- Configure visual filters, global filters and timeframe filters, and control dashboard access by Security Role

Module 5 Hands-On Labs

- Lab 5.1: Customizing Forms — Customize existing Forms and build a Quick Create Form and a Quick View Form.
- Lab 5.2: Configuring System Views — Create custom System Views for the Acme Enterprises data model.
- Lab 5.3: Configuring Charts and Classic Dashboards — Configure a System Chart and build a classic System Dashboard.
- Lab 5.4: Building an Interactive Experience Dashboard — Configure filter columns and Security Roles, then build a multi-stream Interactive Experience

Module 9: Configuring and Deploying Copilot in Dynamics 365

Covers what a customizer configures to bring Copilot to life in Dynamics 365 Sales, Customer Service and Field Service — distinct from Copilot Studio and Microsoft 365 Copilot: enabling it per environment and app, experience profiles, required security privileges, grounding it in organizational data (including via MCP), and a phased approach to rolling it out to a live team.

Lessons for Module 9:

- Copilot in Dynamics 365 vs. Copilot Studio vs. Microsoft 365 Copilot
- Licensing and regional prerequisites
- Enabling Copilot for an environment and an app
- Experience profiles and Copilot settings in Sales, Customer Service and Field Service
- Security roles and privileges for Copilot
- Grounding Copilot in organizational data, including via MCP
- Customizing prompts
- A phased, change-managed rollout approach

After completing module 9, students will be able to:

- Distinguish Copilot in Dynamics 365 from Copilot Studio and Microsoft 365 Copilot
- Enable Copilot features for an environment and a specific app
- Configure experience profiles to control which representatives see which Copilot features
- Assign the security privileges a custom role needs to use Copilot
- Extend Copilot's grounding beyond out-of-the-box Dataverse data using an MCP-connected data source
- Customize prompts for an organization's own scenarios
- Plan a phased, change-managed rollout of Copilot to a live team

Module 9 Hands-On Labs

- Lab 9.1: Enabling and Grounding Copilot for the Acme Enterprises Customer Service Team — Enable Copilot for the environment and app, create a pilot experience profile, grant the required security privileges, and connect an MCP-based tool to extend Copilot's grounding beyond Dataverse.

Module 10: ALM Environment and Solution

A guided tour of the admin portals and settings a customizer and administrator rely on throughout the course — the Microsoft 365 Admin Center, the Power Platform Admin Center, environment-level settings, Data Loss Prevention policies, auditing, and integration with SharePoint, Exchange and Outlook. Also flags where MCP-connected AI clients are later enabled (Module 12).

Lessons for Module 2:

- The Microsoft 365 Admin Center
- The Power Platform Admin Center
- The Power Apps Maker Portal, Power Automate Studio and Power BI Desktop
- Copilot Studio
- Environment-level settings
- Auditing and governance settings
- DLP policies and storage monitoring
- Common admin monitoring tasks
- SharePoint, Exchange and Outlook integration

After completing module 2, students will be able to:

- Understand where to configure Users, Security and Licenses
- Understand the different admin interfaces and portals in the Microsoft Power Platform
- Work confidently in the Power Platform Admin Center
- Configure Environment Settings
- Be aware of integration with SharePoint, Skype, Teams and Outlook
- Configure auditing and apply Data Loss Prevention policies

Module 2 Hands-On Labs

- Lab 2.1: Configuring System Settings — Configure environment-level settings for the Acme Enterprises environment, review auditing and DLP configuration, and explore the key admin portals used throughout the rest of the course.

Module 3: Security Configuration

Covers designing and configuring Business Units, Security Roles, Users and Teams — the foundation of the Dataverse security model — plus Access Teams for dynamic record sharing and Hierarchy Security for manager and position-based visibility. Sets up the grounding needed later when granting Copilot its required privileges (Module 9).

Lessons for Module 3:

- Designing and configuring Business Units

Dashboard with visual filters for the Acme Enterprises Customer Service team.

Module 6: Dynamics 365 and Power BI

A dedicated, hands-on Power BI module: connecting Power BI Desktop to Dataverse, designing Sales and Customer Service dashboards, publishing to the Power BI Service, and embedding the result natively into Dynamics 365. Also shows how Claude, via the Dataverse MCP Server and Power BI's own MCP servers, can build the underlying measures conversationally, with governance considerations covered alongside it.

Lessons for Module 6:

- Power BI for Dynamics 365 — an overview
- Connecting Power BI Desktop to Dataverse
- Designing a Sales dashboard and a Customer Service dashboard
- Publishing to the Power BI Service
- Embedding Power BI in Dynamics 365 as a Dashboard or a Tile
- Using Claude and the Power BI MCP Server to accelerate report development
- Governance for AI-assisted Power BI development

After completing module 6, students will be able to:

- Connect Power BI Desktop to Dataverse and design a Sales or Customer Service dashboard
- Publish a Power BI report to the Power BI Service and embed it into Dynamics 365 as a native Dashboard or Tile
- Use Claude, connected via the Dataverse MCP Server and the Power BI MCP Server, to build Power BI measures conversationally
- Apply appropriate governance to AI-assisted Power BI development

Module 6 Hands-On Labs

- Lab 6.1: Connecting Power BI Desktop and Building a Sales Dashboard with Claude — Connect Power BI Desktop to the Acme Enterprises environment, connect Claude to both the Dataverse MCP Server and the Power BI MCP Server, and build the measures for a Sales dashboard conversationally.
- Lab 6.2: Publishing and Embedding the Power BI Dashboard — Publish the finished report to the Power BI Service, pin visuals to a dashboard, and embed it natively into the Acme Enterprises Sales Management

Covers Solutions as the standard mechanism for packaging, deploying and governing changes across Development, Test/UAT and Production — adding and administering components, managed vs. unmanaged Solutions, export/import, Managed Properties, and Solution Patches. Sets up the ALM foundation the next two modules build on.

Lessons for Module 10:

- Introduction to Solution Management
- Adding and administering components in a Solution
- Unmanaged versus managed Solutions
- Exporting and importing a Solution
- Setting Managed Properties for a Solution
- What happens when you delete a Solution
- Cloning a Solution Patch and cloning a Solution

After completing module 10, students will be able to:

- Understand Solution principles in Dynamics 365 and the Power Platform
- Add and update Solution components
- Know the difference between Managed and Unmanaged Solutions
- Understand the export and import process
- Apply Managed Properties
- Manage Solution releases using Clone as Patch and Clone as Solution

Module 10 Hands-On Labs

- Lab 10.1: Solution Management — Export and import an Unmanaged Solution, configure Managed Properties, export and import a Managed Solution, create a Solution Patch, and clone a Solution.

Module 11: Managing and Supporting Dynamics 365 Copilots in the Power Platform

Covers where Copilot Studio ALM matches the standard Solution Management pattern from Module 10 and where it diverges — non-solution-aware settings, environment variables and connection references, deployment automation options, and a change-management strategy for customizers, developers and support.

Lessons for Module 11:

- Why Copilot needs its own ALM conversation
- The three-environment model for Copilot

- Configuring Security Roles
- Managing Users and Teams
- Implementing Access Teams
- Configuring Hierarchy Security

After completing module 3, students will be able to:

- Manage Security in Power Platform environments
- Configure Business Units, Security Roles, access levels, Users and Teams
- Know the difference between Teams and Access Teams
- Configure Manager and Position Hierarchy Security

Module 3 Hands-On Labs

- Lab 3.1: Configuring Security — Design and configure a Business Unit structure, custom Security Roles, an Access Team and Position Hierarchy Security for the Acme Enterprises organization.

Module 4: Dataverse Management

The largest module in the course: building a complete custom data model — Tables, Columns and Relationships — as three linked lesson groups sharing one running Acme Enterprises scenario. Covers System vs. Custom Tables, Column types including Calculated and Rollup Columns, Column Level Security, Relationship types and behavior, and Hierarchical Relationships, all managed through Solutions.

Lessons for Module 4:

- Creating and managing System and Custom Tables, Table properties, type and ownership
- Custom Table Security
- Column types, formats, Calculated and Rollup Columns
- Column Level Security
- Relationship types, Relationship Behavior and Hierarchical Relationships
- Column Mappings
- Managing Tables, Columns and Relationships using Solutions

After completing module 4, students will be able to:

- Understand Dataverse data-modelling fundamentals and create new Custom Tables
- Manage Table properties, ownership and Custom Table Security
- Understand the different Column Types and Data Types, and create Calculated Columns

app.

Module 7: Power Platform Apps – Model-driven, Canvas, Power Pages

Covers all three ways to put a Dataverse data model in front of users: Model-driven Apps built with the App Designer, Canvas Apps built with Power Fx or generated using Copilot's app-creation options in the Power Apps Maker Portal, and Power Pages sites built and secured in the design studio. Also introduces Plan Designer, which can generate a coordinated solution spanning all three app types plus flows and a Copilot Studio agent.

Lessons for Module 7:

- Introduction to the App Designer and the App interface
- Using the Sitemap Designer and configuring Model-driven Apps
- Managing Model-driven Apps in Solutions
- Creating apps using Copilot in the Power Apps Maker Portal
- Canvas Apps fundamentals: screens, controls and Power Fx formulas
- Building a Canvas App from a natural-language description with Copilot
- Connecting Canvas Apps to Dataverse and other data sources
- Introduction to Power Pages and the design studio (Pages, Styling, Data, Setup and Security workspaces)
- Building a Power Pages site with Copilot
- Securing a Power Pages site: authentication, Table Permissions and Web Roles
- Plan Designer — generating a coordinated Power Platform solution from one description
- Managing Canvas Apps and Power Pages sites in Solutions

After completing module 7, students will be able to:

- Use the App Designer to customize an existing Model-driven App and build a new one
- Configure the Sitemap and manage Model-driven Apps in Solutions
- Use the Power Apps Maker Portal's Copilot-driven creation options — Start with a design, Start with data and Start with a plan — to kick off a new app
- Build a Canvas App using screens, controls and Power Fx, connected to Dataverse
- Use Copilot to generate a Canvas App's data model and starter screens from a natural-language description
- Build and style a Power Pages site in the

- Solution-aware vs. non-solution-aware Copilot components
- Environment variables and connection references for Copilot
- Reusable component collections
- Deployment automation: Power Platform Pipelines, GitHub Actions and Azure DevOps
- Version control with Copilot Studio's native Git integration
- Testing before promotion
- A change-management strategy for customizers, developers and support

After completing module 11, students will be able to:

- Explain why Copilot Studio agents need additional ALM discipline beyond standard Solution Management
- Apply the three-environment model and the ALM 'golden rules' to a Copilot deployment
- Identify which Copilot components travel in a Solution and which require manual reconfiguration after deployment
- Use environment variables and connection references so an agent's data sources point at the right environment automatically
- Choose an appropriate deployment tool for an organization's maturity level
- Build a post-deployment checklist and change-management strategy for a Copilot rollout

Module 11 Hands-On Labs

- Lab 11.1: Promoting the Acme Enterprises Copilot Configuration from Development to Test — Export the Copilot-enabled Solution as managed, configure environment variables and connection references, import into Test, and work through the non-solution-aware settings checklist.

Module 12: Managing and Supporting Power Platform Solutions with the Claude MCP Server

Introduces the Model Context Protocol and the Dataverse MCP Server, and shows how Claude — connected to a live environment via the official Dataverse plugin — becomes a genuine day-to-day support and administration tool: inspecting the data model, querying and diagnosing issues in natural language, and the governance controls (client allow-listing, DLP, destructive-action approval) that keep it safe.

Lessons for Module 12:

- Configure Column Level Security
- Create One-to-Many and Many-to-Many Relationships and configure Relationship Behavior
- Create a Hierarchical Relationship and configure Column Mappings

Module 4 Hands-On Labs

- Lab 4.1: Creating and Managing Tables — Create a Solution, build the Acme Enterprises custom Tables, add existing System Tables, and configure Table permissions.
- Lab 4.2: Creating and Managing Columns — Create Columns on the new Tables and build a Global Choice.
- Lab 4.3: Creating Calculated Columns — Build a Calculated Column and add it to a Table Form.
- Lab 4.4: Configuring Column Level Security — Enable a Column for Field Level Security and configure a Column Security Profile.
- Lab 4.5: Table Relationships — Create Table Relationships and configure Relationship Behavior.
- Lab 4.6: Hierarchical Relationships — Configure a Hierarchical Relationship between Tables.
- Lab 4.7: Configuring Column Mappings — Configure Column Mappings between related Tables.

design studio, with and without Copilot
- Secure a Power Pages site using authentication, Table Permissions and Web Roles
- Explain what Plan Designer generates and when to reach for it instead of building an app type individually

Module 7 Hands-On Labs

- Lab 7.1: Customizing an Existing Model-driven App — Use the App Designer to customize an existing Model-driven App for Acme Enterprises.
- Lab 7.2: Building a Custom Event Management Model-driven App — Use the App Designer to build a new Model-driven App from scratch.
- Lab 7.3: Building a Canvas App with Copilot — From the Power Apps Maker Portal home page, describe an event check-in app in natural language, let Copilot generate the underlying Dataverse tables and a starter Canvas App, then refine the app's screens and formulas by hand.
- Lab 7.4: Building and Securing a Power Pages Site with Copilot — Use Copilot to generate a public event-registration site, then configure authentication, Table Permissions and Web Roles so external attendees can only see and edit their own registration.

Module 8: Flows: Workflows, Business Process Flows and Cloud Flows in Dynamics 365

Covers classic Workflows, Business Process Flows and Custom Actions, creating Cloud Flows using Copilot in Power Automate, and where the Process Mining MCP server now fits into the same automation story.

Lessons for Module 8:

- Introduction to Processes
- Workflow
- Business Process Flows
- Custom Actions
- Creating Flows using Copilot in Power Automate
- The Process Mining MCP server

After completing module 8, students will be able to:

- Apply best practice when designing and implementing business process automation in Dynamics 365
- Understand the different types of Processes in Dynamics 365
- Create a Workflow to perform various

- Introduction to the Model Context Protocol (MCP)
- The Dataverse MCP Server — architecture and supported clients
- Connecting Claude to a Power Platform environment, including the official Dataverse plugin
- Available MCP tools and what each is used for
- Using natural language to support and troubleshoot a deployed solution
- The Power Platform CLI MCP Server for environment and Solution operations
- Governance, security and licensing for MCP-connected AI agents

After completing module 12, students will be able to:

- Explain what the Model Context Protocol (MCP) is and why it matters for the Power Platform
- Understand the architecture of the Dataverse MCP Server and which clients it supports
- Enable and configure the Dataverse MCP Server for an environment
- Connect Claude to a Dataverse environment using the official Dataverse plugin
- Use natural-language requests to inspect table schemas, query data and diagnose solution issues
- Understand the difference between the Dataverse MCP Server and the Power Platform CLI MCP Server
- Apply governance best practice, including allow-listing clients, Managed Environment DLP policies and destructive-action approvals

Module 12 Hands-On Labs

- Lab 12.1: Supporting the Acme Enterprises Event Management Solution with Claude — Enable the Dataverse MCP Server, connect Claude using the official Dataverse plugin, and use natural language to investigate and resolve a support issue reported against the Acme Enterprises solution built across the course.

actions
- Create a Business Process Flow to guide a user through a business process
- Understand the benefits of Custom Actions
- Create a Cloud Flow using Copilot by describing the automation in natural language, then refine it using the Copilot pane

Module 8 Hands-On Labs

- Lab 8.1: Creating a Workflow — Define when a Workflow starts, add Workflow steps, and activate it.
- Lab 8.2: Creating a Business Process Flow — Add stages, data and action steps, configure branching logic, and secure a Business Process Flow.
- Lab 8.3: Creating a Flow with Copilot — From the Power Automate home page, describe an Acme Enterprises automation in natural language, let Copilot generate the trigger, actions and connections, then refine the flow further using the Copilot pane in the flow designer.

Further Information:

For More information, or to book your course, please call us on 00 966 92000 9278

training@globalknowledge.com.sa

www.globalknowledge.com/en-sa/

Global Knowledge - KSA, 393 Al-Uroubah Road, Al Worood, Riyadh 3140, Saudi Arabia