

Customizing Dynamics 365

**Implementing and Releasing
Business Solutions**

Sanjaya Yapa

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Customizing Dynamics 365: Implementing and Releasing Business Solutions

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About the Author



Sanjaya Yapa currently works as a Microsoft Dynamics 365 consultant in Melbourne, Australia. He has more than 12 years of experience in the industry and has been working with various Microsoft technologies since 2005. He possesses a wealth of experience in software design, development, team leadership, product management, and consultancy. He specializes in solution design and development with Microsoft Dynamics 365 and the application life cycle management with Azure DevOps. Sanjaya was the coauthor of *Effective Team Management with VSTS and TFS* (www.apress.com/us/book/9781484235577). Find him on @sanjaya_yapa and at techjukebox.wordpress.com and almbox.wordpress.com.

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Introduction

The objective of this book is to introduce the reader to the features of Dynamics 365 for Customer Engagement, provide examples, and show how release management can help to increase productivity when delivering software to users. The platform has a ton of features, and it is growing extremely fast; in fact, it is difficult to condense such a plethora of features into a book of this size. Therefore, this book covers the features that are used primarily to design and develop solutions using the platform and gives references for further reading. This book can be used by intermediate to advanced programmers with Dynamics 365 knowledge. The topics covered in this book are ideal for both technical and functional consultants.

Specifically, Chapter 1 will set the stage for the book by introducing you to the evolution of the platform and by explaining how to capture requirements using Azure DevOps. This chapter will also introduce you to the example scenario, which will be used to explain the platform features in the upcoming chapters. Chapter 2 is all about setting up a development environment and configuring release automation. Chapters 3 and 4 cover how to customize the platform to implement the requirements using form customizations, autonumbering, business rules, workflows, and business process automation. These chapters will also introduce you to using TypeScript instead of JavaScript and to Microsoft Flow.

Advanced customizations are introduced from Chapter 5 onward, starting with plug-ins and custom workflows. In Chapter 6, you will gain knowledge about Azure integrations including WebJobs, Functions, and Logic Apps. Reporting is covered in Chapter 7, which highlights a wide range of features and configurations. The commonly used features are described, and additional reading references are given. Like Chapter 7, Chapter 8 covers another mammoth feature, the Dynamics 360 portals for external user interactions. Since this is a bulky topic, this chapter introduces the feature and gives additional references. The book concludes in Chapter 9 with the discussion of data migration along with design tips and best practices.

This book will serve as your reference for your Dynamics 365 for Customer Engagement implementation needs. I hope it will be your go-to reference when faced with an implementation challenge.