

Dynamics 365 and Power Platform: Integrated Business Solutions

Guided configuration, automation, analytics and a bounded integrated project

FA-0606 · 24 training days, 8 hours/day; optional 1-day course assessment

Automation, RPA & Power Platform · Data & Analytics · Mainframe & Enterprise Systems · Agentic & Generative AI

Build skills across selected Dynamics 365 applications and Power Platform components, then integrate them in a scoped learning project.

Introduction

This extended programme introduces and develops selected Dynamics 365 and Power Platform capabilities through guided labs. It covers canvas/model-driven apps, automation, Power BI, conversational agents and Sales, Customer Service and Field Service configuration, followed by a bounded integrated project.

The detailed source agenda contains 24 training days, despite its 23-day headline, plus a separately described eight-hour assessment. This presentation follows the detailed 24-day allocation and labels assessment as an optional additional day. It does not claim to cover every Dynamics application or Power Platform capability, award a Microsoft qualification or guarantee examination readiness.

Labs require prepared, authorised environments with appropriate application, connector, reporting and Copilot Studio entitlements. Trial eligibility and feature availability vary. Projects and assessments use synthetic records and controlled sharing; a reviewed learning solution does not establish production security, legal compliance or enterprise readiness.

Learning outcomes

The programme teaches participants to:

- Configure selected Dataverse-backed business forms, views and role assumptions.
- Create canvas/model-driven apps and review delegation, formulas and deployment.
- Build cloud/desktop automation examples with connectors, conditions and failure handling.
- Transform sample data, model relationships and create Power BI measures and reports.
- Build and test a bounded Copilot Studio conversation with flow integration.
- Explain selected Sales, Customer Service and Field Service processes and customisations.
- Plan, implement and review an integrated learning project with explicit access, testing and rollout limitations.

Prerequisites

- Familiarity with business processes, spreadsheets and web-based applications.
- Basic data/table concepts; programming, HTML/JavaScript or API knowledge is helpful for custom connectors and component-framework demonstrations.
- Prepared training environments, compatible machines and approved synthetic data; desktop flows require a compatible Windows setup.
- Willingness to work through guided exercises and a multi-day project.

Training outline

1. Day 1 – Foundations and Environment

Dynamics 365 overview – 2 hours

- What is Dynamics 365?
- Dynamics 365 Components
- Dynamics 365 Applications

Power Platform overview – 2 hours

- Power Apps
- Power Automate
- Power BI
- Microsoft Copilot Studio (including former Power Virtual Agents capabilities).

Environment and access — 2 hours

- Provision or access an eligible authorised training environment; trial availability, licences and roles must be checked.
- Setting Up Users and Security Roles
- Accessing the Power Platform Admin Center

Customisation basics — 2 hours

- Customizing Forms and Views
- Adding Fields and Sections
- Customizing Business Rules

2. Day 2 — Power Apps Fundamentals

App types and a canvas app — 2 hours

- Types of Power Apps
- Power Apps Studio
- Creating a Canvas App

Canvas design — 2 hours

- Working with Controls
- Screen Navigation
- Media and Images

Data integration — 2 hours

- Connecting to Data Sources
- Working with Collections
- Delegation and Data Limitations

Formulas and handling errors — 2 hours

- Common Functions and Expressions
- Variable Usage
- Error Handling

3. Day 3 — Model-Driven Apps and Extensions

Model-driven apps — 2 hours

- App Design and Components
- Site Map Customization
- Business Process Flows

Custom connectors — 2 hours

- Creating Custom Connectors
- Consuming APIs
- Testing and Deployment

Component framework — 2 hours

- Introduction to the Power Apps Component Framework
- Creating Custom Components
- Integrating Components into Apps

Use a prepared component to inspect the framework; full custom-component development requires additional programming experience.

Publishing and access — 2 hours

- Publishing Apps
- Sharing and Security
- Monitoring and Analytics

4. Day 4 — Power Automate Fundamentals

Flow concepts — 2 hours

- Workflow Automation
- Types of Flows
- Creating a Flow

Connectors and triggers — 2 hours

- Using Connectors
- Trigger Types
- Flow Configuration

Actions and conditions — 2 hours

- Action Types
- Conditional Statements
- Loops and Arrays

Expressions and errors — 2 hours

- Common Expressions
- Using Functions
- Error Handling

5. Day 5 — Desktop Automation and Integration

Desktop flows — 2 hours

Current Power Automate desktop-flow concepts, recording and cloud-flow integration where supported; legacy UI Flow terminology explained.

Custom connectors — 2 hours

- Creating Custom Connectors for Power Automate
- API Integration
- Testing and Deployment

Administration — 2 hours

- Monitoring and Analytics
- Flow Management
- Access, governance and organisational requirements; configuration is not a guarantee of compliance.

Dynamics integration — 2 hours

- Dynamics 365 Triggers and Actions
- Creating Flows for Dynamics 365 Apps
- Best Practices

6. Days 6–8 — Power BI Foundations

Day 6 — Components and prepared reporting environment

- Power BI Components
- Power BI Desktop
- Power BI Service

Day 7 — Sources, queries and transformations

- Connecting to Data Sources
- Power Query Editor
- Data Transformations

Day 8 — Relationships, measures and DAX

- Creating Relationships
- Measures and Calculated Columns
- DAX Fundamentals

7. Day 9 — Extended Power BI Topics

Modelling — 2 hours

- Time Intelligence
- DAX Patterns
- KPIs and Hierarchies

Visual analysis — 2 hours

- Custom Visuals
- Advanced Chart Techniques

- Interactivity and Drill-Down

Embedded reporting overview — 2 hours

- Embedding Power BI Reports
- Customizing and Integrating Reports
- Security and Licensing

Administration — 2 hours

- Power BI Service Administration
- Permissions, governance and applicable organisational obligations.
- Monitoring and usage analytics for the selected environment.

Embedded deployment and enterprise administration are selected demonstrations and design reviews, not complete production implementations.

8. Days 10–11 — Copilot Studio Conversations

Day 10 — Concepts and conversation design

Copilot Studio incorporates the former Power Virtual Agents capabilities; compare current supported authoring with legacy classic bots.

Create and inspect a bounded agent

- Creating a Virtual Agent
- Current supported agent authoring interface.

Topics, conversation flow and variables

- Topics and Triggers
- Designing Conversation Flows
- Using Variables and Entities

Day 11 — Flow Integration and Management

Flow-backed tools and error handling

- Use supported flow/tool integration for the selected Copilot Studio experience.
- Actions and Conditions
- Error Handling

Publishing and monitoring

- Publish a reviewed agent to a controlled learning channel.
- Channels and Integration
- Monitoring and Analytics

Review authentication, permissions, test results and channel/usage entitlements before publishing to a controlled learning channel.

9. Days 12–13 — Dynamics 365 Sales

Day 12 — Sales concepts and customisation

Sales tables, relationships and processes.

- Opportunities and Quotes
- Orders and Invoices

Customizing Sales Application (4 hours)

- Customizing Forms and Views
- Business Process Flows
- Sales Dashboards and Reports

Day 13 — Integration and administration

Integrating with Power Platform

- Custom Connectors and Actions
- Available Sales AI/insights features and their licence/configuration constraints.

Sales Administration (4 hours)

- Access controls and governance considerations.
- Monitoring and Analytics
- Best Practices

10. Days 14–15 — Dynamics 365 Customer Service

Day 14 — Cases, knowledge and customisation

Customer Service tables and processes.

- Case Management
- Knowledge Base

Customizing Customer Service Application (4 hours)

- Customizing Forms and Views
- Business Process Flows
- Service Dashboards and Reports

Day 15 — Integration and administration

Integrating with Power Platform

- Custom Connectors and Actions
- Available Customer Service AI/insight capabilities; verify sources and permissions.

Customer Service Administration (4 hours)

- Access controls and governance considerations.
- Monitoring and Analytics
- Best Practices

11. Days 16–17 — Dynamics 365 Field Service

Day 16 — Work orders, mobile use and customisation

Field Service tables and processes.

- Work Orders and Scheduling
- Mobile Application

Customizing Field Service Application (4 hours)

- Customizing Forms and Views
- Business Process Flows
- Field Service Dashboards and Reports

Day 17 — Integration and administration

Integrating with Power Platform

- Custom Connectors and Actions
- Available Field Service insights/AI capabilities; configuration-dependent overview.

Field Service Administration (4 hours)

- Access controls and governance considerations.
- Monitoring and Analytics
- Best Practices

12. Days 18–23 — Integrated Learning Project

Days 18–19 — Scenario, requirements and design

- Define a Business Scenario
- Identify Requirements
- Plan and Design Solutions

Days 20–21 — Bounded solution development

- Implementing Dynamics 365 Applications
- Developing Power Platform Solutions
- Integrating Applications and Services

Day 22 — Controlled deployment planning

- Deployment Planning
- Access, data handling and review requirements; identify remaining security/compliance work.
- User Training and Adoption

Day 23 — Review and feedback

- Review Project Deliverables
- Evaluate Solution Effectiveness
- Identify Areas for Improvement
- Gather Feedback and Lessons Learned

Choose a realistic synthetic business scenario, use prepared applications and record test results, access assumptions and unresolved issues before considering operational adoption.

13. Day 24 – Review and Continuing Learning

Recap – 2 hours

- Overview of Dynamics 365 and Power Platform Concepts
- Review Key Takeaways
- Addressing Questions and Concerns

Development and operational practices – 2 hours

- Development and Customization
- Security and governance review, with explicit remaining obligations.
- Performance and Scalability

Further learning – 2 hours

Identify appropriate current Microsoft Learn resources and official exam objectives if separately pursuing a qualification; this course does not claim exam alignment or confer certification.

Feedback and next steps – 2 hours

- Course Evaluation
- Additional Resources and Learning Opportunities

14. Optional Additional Day – Course Assessment

Knowledge review – 3 hours

Review Dynamics/Power Platform foundations, Power Apps, Power Automate, Power BI, Copilot Studio and the selected Dynamics applications.

Prepared practical tasks – 5 hours

- Canvas app: refine a customer/order example, inspect data binding, formulas and controlled sharing.
- Automation: refine an order-approval flow, test decisions and inspect notifications with learning-only recipients.
- Analytics: prepare sample sales data, relationships, measures and report views.
- Conversation: refine a bounded inquiry agent and test a prepared flow integration.

- Integrated Dynamics example: review or extend supplied Sales/Customer Service/Field Service components and explain their dependencies.

Assess completeness, appropriate design, usability, integration and evidence of testing. The one-hour integrated task is a limited extension/review of prepared components, not a full enterprise rollout. Results are course feedback, not an external certification.