



Form Customization

Dynamics 365 allows you to customize the way you view data and menu options in your Dynamics system. This can even be done by security role so that your staff gets the information they need in a format specific to them. In this course you will learn how to customize a form, add sections, add grids, and edit the menu navigation. We will touch on assigning these forms to specific user roles.

COURSE OBJECTIVE: To create a usable form with relevant data, subgrids, and simplified navigation.

Lesson 1: Personal and System Forms

- Task 1: Understand the difference between personal and system forms
- Task 2: Navigation paths to create a personal or system form
- Task 3: Identify Form Types

Lesson 2: Adding and Removing Existing Fields from the Form

- Task 1: Use the Field Explorer to filter results and select an unused field
- Task 2: Add the Field with Drag and Drop or Double Click Method
- Task 3: Remove the Field using the toolbar command
- Task 4: Selecting Header, Body, Footer to place fields

Lesson 3: Adding Tabs Sections and Columns to a Form

- Task 1: Explain the difference between Tabs and Sections
- Task 2: Add a Tab to the Form and Name it
- Task 3: Add a Section to an Existing Tab
- Task 4: Add spacers for formatting
- Task 5: Edit an existing section (columns, width, height)
- Task 6: Remove a section and a Tab from the form

Lesson 4: Adding Subgrids to a form

- Task 1: Remove a subgrid that does not fit your business needs
- Task 2: Set properties a new subgrid
- Task 3: Set formatting for the subgrid columns and rows
- Task 4: Open the subgrid for editing

Lesson 5: Customizing the Menu Navigation

- Task 1: Activating the Menu Navigation Option
- Task 2: Change the order of the menu options
- Task 3: Remove a menu option
- Task 4: Add a menu option from the Relationship Explorer

Lesson 6: Viewing and Assigning the New Form

Task 1: Save, Publish and Share the new form

Task 2: Selecting the new form from the entity

Task 3: Assigning the new form to a Security Role