MICROSOFT DYNAMICS 365 FOR LEGAL

d365Legal

Customization opportunities

A leadership and operations overview

Based on the Dynamics 365 Admin Customization Guide
August 2026

Where customization can help

Better fit for daily legal work

The guide documents changes to record screens and worklists, with a repeatable route from UAT to production.

Record forms

Add or remove fields and adjust tabs or sections.

Field behaviour

Change field properties and update business rules.

Worklists and views

Choose columns, filters, widths and sort order.

Controlled releases

Package only changed components in a dedicated solution.

Forms can reflect how teams work

Documented options

Fields and properties

Expose relevant information and adjust how users capture it.

Tabs, sections and rules

Group information on the form and update business rules where needed.

ILLUSTRATIVE LEGAL USE

A clearer matter-intake form

Group client details and matter information into clear sections.

Surface the fields the intake team needs most.

Views can focus attention on relevant work

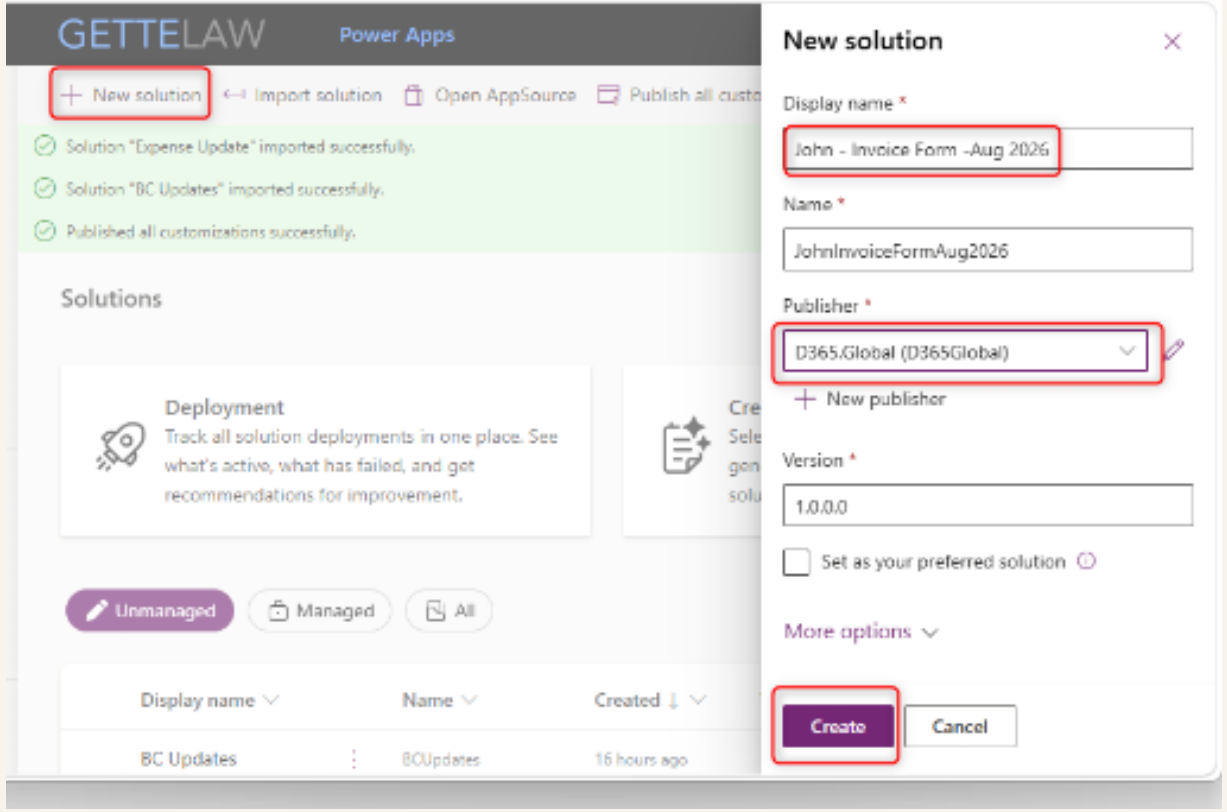
Illustrative example: a focused matter worklist

View setting	Broad list example	Focused worklist example
Columns	Many available fields	Matter, owner and next date
Filter	All records in the table	Open matters assigned to me
Sort order	Alphabetical listing	Next date, earliest first
Column widths	General layout	More space for matter names

Administrators can change these settings in the view editor, then save and publish.

Small solution packages limit unintended changes

SOURCE EXAMPLE: NEW SOLUTION



01 A dedicated solution

Keep one logical piece of work together. Avoid the Default Solution.

02 The existing publisher

Use the organisation's custom publisher so component prefixes stay consistent.

03 Changed items only

Include the specific form, view or field. Avoid adding an entire table's contents.

A controlled route from UAT to production

01

Build and test

Save, publish and confirm in UAT.

02

Export

Update the version and export the solution.

03

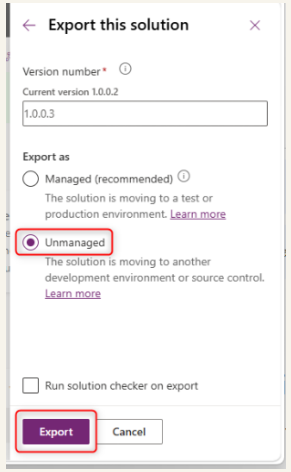
Import

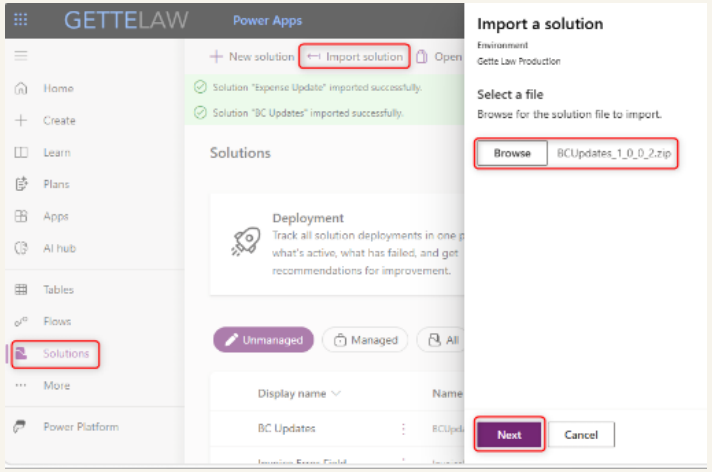
Check name, version and publisher in production.

04

Verify

Publish, refresh and confirm with users.





Package policy matters

The guide uses an unmanaged export. The export screen also labels Managed as recommended.

Confirm the production package policy and dependencies with the platform owner.

Governance and scope boundaries

Routine configuration

Forms, field properties, business-rule updates and views.

Authorised makers need System Customizer or System Administrator roles in both environments.

Separate assessment

Integrations, portals, advanced automation and bespoke code fall outside this guide.

Assess feasibility, cost and support separately.

Release watch list

Unpublished changes, overly broad packages and stale browser caches.

A focused first customization

Proposed pilot

One form.
One worklist.
One scoped release.

Choose a recurring operational pain point and agree what a better experience should look like.

Business owner

Select the team and the problem to solve.

Acceptance criteria

Check information capture and worklist relevance.

Release approval

Test in UAT, confirm the package policy and verify production with users.

Reference: Dynamics 365 Admin Customization Guide August 2026.docx