Aman Upadhyay

Technical Lead
February 2018 – Present
XRM Labs
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ABOUT ME

A seasoned Techno-Functional Professional with **6+ years** of experience in Information Technology (IT), specializing in **Microsoft Dynamics 365 Customer Engagement (CE) and Power Platform Solutions**.

I bring extensive expertise in out-of-the-box and custom configurations, customizations, integrations and data migrations. My skill set includes proficiency in working with Model Driven Apps, Canvas Apps, Power Pages (formerly Power Portals), Power Automate, Approval flows, Code Activities, Plugins, Workflows, Business Rules, JavaScript, HTML Web Resources, PCF Controls, Chatbots, SSRS Reports, Microsoft Copilot, Azure OpenAI, Azure Web Services, Azure Functions, Azure Logic Apps, Blazor Web Assemblies, C# and requirement analysis.

My professional roles encompass the following key responsibilities:

Client Engagement: I am responsible for fostering productive relationships with clients, involving activities such as gathering and analyzing requirements, assessing risks, designing applications and documents, implementing, and maintaining various applications, and finalizing technical specifications.

Technical Leadership: I serve as the technical Microsoft Dynamics development resource across various client platforms, consistently striving to enhance system performance and scalability.

Business Requirements: My work entails collaborating closely with clients to comprehensively gather and comprehend their business and system requirements, especially in the context of Dynamics CE, PowerApps, and Power Portal application enhancements.

Innovative Solutions: I take great satisfaction in devising innovative systems that effectively address business challenges by leveraging cutting-edge technologies. My solutions are designed to enhance competitiveness, productivity, and customer service.

Effective Multitasking: I possess a strong aptitude for problem-solving and a proven ability to manage multiple tasks efficiently, even under demanding time constraints.

Technical Troubleshooting: I am adept at troubleshooting and conducting in-depth research to resolve technical issues pertaining to clients' CRM instances, applications, and sites.

In summary, my extensive experience, technical powers, commitment to excellence and proficiency in delivering solutions that drive business success make me an important asset in any IT project or organization.

SKILLS/TECHENICAL PROFICIENCIES

- **Microsoft Dynamics CE Customization and Configuration**: Proficient in customizing and configuring Microsoft Dynamics CE (Customer Engagement) both online and on-premises to meet specific organizational needs.
- **Entity Mapping and Security Roles**: Skilled in configuring entity mapping and defining precise security roles to ensure data integrity and controlled access.
- **Ribbon Button Development**: Adept at creating Ribbon buttons within PowerApps Studio using Power FX and Ribbon Workbench to enhance user experience and functionality.

CONTACT DETAILS

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CERTIFICATIONS

Microsoft Certified: Power Platform Developer Associate

Applied Skill: Create and manage automated processes by using Power Automate

Applied Skill: Create and manage canvas apps with Power Apps

Applied Skill: Develop an ASP.NET Core web app that consumes an API

KEY DELIVERABLES

Highly proficient in writing code activities, writing plugins code, Microsoft flows, integration applications as well as out of the box workflows.

Experience in CRM customization using business rules, entity mapping, client-side JavaScript, and jQuery.

Experience in creating HTML web resources to add new CRM functionality, Implementing Google/Bing maps with CRM as per client's need.

STRENGTHS

Analytical approach in finding solutions, Punctual, Flexible & Adaptable, Effective listener, Attention to details, can work alone as well as a team player.

OTHER SKILLS

Developing Web Application, Building Drones, writing codes in C# & JavaScript, writing technical blogs, Implementing Internet of Things modules hosted over Azure. Working with Google Sites and Azure Static Sites.

- **Integration Expertise**: Experienced in orchestrating bidirectional integration between Microsoft Dynamics CE and the Power Platform and various third-party systems, ensuring seamless data flow and process automation.
- **Workflow and Plugin Development**: Proficient in designing and implementing workflows and plugins using Visual Studio C# to automate business processes and enhance system functionality.
- **Business Rules and JavaScript**: Capable of implementing business rules and JavaScript code to enforce data validation and enhance user interaction within Dynamics CE.
- **Web Resource and Custom Control Development**: Skilled in crafting HTML web resources and custom controls to extend the capabilities of Dynamics CE.
- **App Development**: Proficient in building Model Driven Apps and Canvas Apps within the Power Platform to create tailored solutions for specific business requirements.
- **Power Automate Mastery**: Experienced in creating Power Automate flows using both out-of-the-box and custom connectors to automate complex workflows and streamline business processes.
- **Power Portal and Power Pages**: Competent in working with Power Portal and Power Pages to provide external stakeholders with access to relevant information and functionalities.
- **Azure Integration**: Knowledgeable in writing and implementing Azure Web Services, Functions, and Logic Apps, Azure Open AI leveraging the Azure cloud platform to enhance Dynamics CE capabilities.
- **Load Balancing and Azure AD B2C**: Proficient in configuring Azure Gateways for load balancing and setting up Azure AD B2C for enhanced security and identity management.
- **Data Export and Azure Service Bus**: Skilled in configuring Data Export Service and Azure Service Bus to facilitate data transfer and messaging between systems.
- **SSRS Reporting**: Experienced in generating SSRS (SQL Server Reporting Services) reports using Fetch XML to provide valuable insights and data visualization.
- **Data Migration**: Possess a fundamental understanding of data migration techniques using SSIS (SQL Server Integration Services) and Kingsway Soft for seamless data transfer and transformation.

These skills collectively contribute to a comprehensive technical toolkit, enabling the effective customization, integration, and optimization of Microsoft Dynamics CE and related technologies for enhanced organizational efficiency and performance.

PROJECT EXPERIENCE

Dynamics 365 Enhancement and Support (June 2024 – Ongoing)

Technologies used within the project:

- Dynamics 365 CE
- Customization,
- Configurations,
- Workflows,
- Plugins,
- Canvas Apps,
- Power Pages portal,
- Power Automate,
- JavaScript,
- Power BI,
- SSRS Reporting,
- 3rd Party Integration

For Phase 2 of the project, I was re-enrolled to continue my work with a prominent USA-based IT service provider, a recipient of multiple

Power Pages / Dynamics 365 Enhancement (June 2024 – July 2024) (Small Project)

Technologies used within the project:

- Dynamics 365 CE
- D365 CE Customization,
- Configurations
- Workflows,
- Plugins,
- Canvas Apps,
- Power Pages portal,
- Power Automate,
- JavaScript,
- Azure Open AI
- Azure Functions

This project was undertaken for a USA-based IT services provider and Microsoft Gold Partner specializing in managed services. As a Dynamics 365

Post-Graduation: Master of Technology in Computer Science and Engineering from SVN University.

Graduation: Bachelor of Technology in Computer Science and Engineering from Shri Ramswaroop Memorial University.

Intermediate: Seventh Day Adventist Senior Secondary School.

Highschool: Seventh Day Adventist Senior Secondary School.

Microsoft Inner Circle awards. The company required a Dynamics 365 CE specialist to support one of their key clients—an insurance and claims provider.

As a member of the D365 CE resource team, I played a pivotal role in supporting their Dynamics 365 CE implementation. My contributions involved customizing their existing solution to incorporate new functionalities and automations aligned with their complex business logic. Additionally, I performed integrations with other systems to enhance the overall solution's efficiency and functionality.

CE consultant, I collaborated closely with the Solution Architect and a Microsoft Certified Trainer to implement various enhancements within the Power Pages portal. One of the key contributions was integrating the portal's business processes with Azure Open AI, which enabled improved data validation and seamless user interaction.

I successfully integrated a Power Pages portal with Azure Open AI using an Azure Function to enhance the validation and justification of time entries, financial records, and billable hours entered by users. The solution ensures that all submitted data, including developed components, is clearly explained and easily understood, even by individuals without prior background knowledge of the system.

In addition to these enhancements, I developed several custom logic solutions to ensure that the data entered by users is accurate, valid, and comprehensible.

Dynamics 365 Enhancement (February 2023 – May 2024)

Technologies used within the project:

- Dynamics 365
- D365 CE Customization,
- Workflows,
- Plugins,
- Canvas Apps,
- Power Pages portal,
- Power Automate,
- HTML web resources,
- JavaScript,
- Key pay integration

This Australia based IT service providers and Microsoft Gold partner managed services company.

Worked as a D365 CE resource to support their projects and implemented several Power Pages portals and assisted the team in building a managed solution for NDIS Claims with Key pay integration which can be install over any Dynamics 365 system with Sales and Project Operations with its own Self-Service Portal for the customers.

Also developed a logic to merge custom entities with Fluent UI like the OOB and deployed to several client system so that Managers can merge records for custom entities.

Currently working on upgrading a Sales solution to have recurring contract capabilities.

Dynamics 365 Enhancements and .Net Core Custom Portal (October 2022 – December 2023)
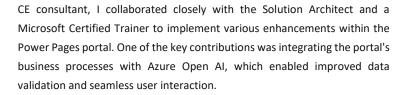
Technologies used within the project:

- Dynamics 365
- D365 CE Customization,
- Workflows,
- Plugins,
- Power Automate,
- JavaScript's,

Dynamics 365 Enhancement (February 2023 – February 2023)

Technologies used within the project:

- Dynamics 365
- D365 CE Customization,
- Workflows,
- Plugins,
- JavaScript,
- Power Apps portal,
- Power Automate,
- HTML web resources,
- Data Migration
- DevOps

This USA based company deals in the amusement industry and keeps detailed data on over 300 carnival and circus companies nationwide.

Worked as a D365 CE resource to support their project performed several customizations in their Dynamics CE and Power Portal.

Also build a custom control (PCF) for their sales team so that they can view all their available properties on a Bing map with their information and status, the map also has the capability to create leads just on one click for sales team to utilize further in their business logic.

Power Apps Development (January 2023 – February 2023)

Technologies used within the project:

- Model Drive App
- Power Apps Customization,
- Workflows,
- Plugins,
- Power Automate,
- JavaScript's,
- PCF Controls

- .Net Core Web Application
- Azure Gateway
- Azure Web Service

For one of the most reputed Law universities of UK wanted a Custom Portal to connect with their Dynamics CE and perform several CRUD operations over several tables to record their students' grades and performance.

We have built a .Net core portal connected with Azure AD B2C which acts as a Student Self Service Portal or a LMS system and performs CRUD operations in Dynamics CE.

The Portal was configured with Azure Gateway and Azure Elasticity to manage high traffic situations.

Dynamics 365 Enhancement (February 2021 – October 2022)

Technologies used within the project:

- Dynamics 365
- CRM Customization,
- Workflows,
- Plugins,
- Power Automate,
- HTML web resources,
- JavaScript's,
- SSRS reports
- .Net Console Applications
- Jira Board

This USA based IT service provider which has several Microsoft inner circle awards wanted a Dynamics CE resource to work for one of their prime customers which are insurance and claims providers.

Worked as a CRM resource team member to support their Dynamics CE project, customized their existing solution to have several new functionalities/automations as per their business logics also performed some integrations.

Dynamics 365 Enhancement (August 2020 – November 2020)

Technologies used within the project:

- Dynamics 365
- CRM Customization,
- Workflows,
- Plugins,
- Canvas Apps,
- Power Apps portal,
- PCF controls,
- Power Automate,
- HTML web resources,
- JavaScript's

This UK based IT service providers company helps medium sized

- SharePoint

This Europe based is a knowledge equity investor, a visionary, and a creator of bespoke and superbly aligned commercial solutions. They apply financial acumen, scientific principles, creativity, and innovation to the growth of their customers business with stocks and assets for their partner companies.

For their Sales and Marketing team we have developed a Custom Model driven app to automate their business to keep proper track of their customers owning assets, properties, insurances, legal documents, and stakeholders. The App also has several PCF controls equipped with google maps which they use for tracking and managing their customers' properties and locations. The Dynamics CE is integrated with SharePoint with custom documents locations and folders hierarchy.

Dynamics 365 Enhancement (November 2020 – February 2021)

Technologies used within the project:

- Dynamics 365
- CRM Customization,
- Workflows,
- Plugins,
- Canvas Apps,
- Power Apps portal,
- Power Automate,
- HTML web resources,
- JavaScript's,
- Data Migration
- DevOps
- PT-X Integration

This UK based IT service providers and Microsoft Gold partner managed services company.

Worked as a CRM resource to support their projects if CRM Upgrade from 2016 to Dynamics 365, customizing marketing module as per customer's business logic and implementing subscription-based solution.

Also perform integration with PT-X payments and Sage Pay.

MS CRM 2016 Custom Job Closure Portal (July 2020 – August 2020)

Technologies used within the project:

- MS CRM 2016 On-premises,
- CRM Customization,
- Workflows,
- Asp.net Website,
- Plugins
- JavaScript,

This UK based IT service providers company, delivering end-to-end business support solutions to over 5,000 end users and over 300 businesses. Implemented a custom portal to support their CRM 2016 on-premises Job closure system.

companies to implement businesses plan and leading technology solutions from Microsoft. Worked as a Dynamics CRM resource to implement their business logics and created several Canvas apps, PCF controls and implement Microsoft flows, workflows with custom code activities and plugins. Also performed CRM customizations.

Dynamics 365 Custom Job Closure Portal (July 2020 – August 2020)

Technologies used within the project:

- MS CRM 2016 On-premises,
- CRM Customization,
- Workflows,
- Asp.net Website,
- Plugins

This UK based IT service providers company, delivering end-to-end business support solutions to over 5,000 end users and over 300 businesses. Implemented a custom portal to support their CRM 2016 on-premises Job closure system.

Dynamics 365 Customer Service Self Help Portal (March 2020 – April 2020)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- CRM Customization,
- Power Automate,
- Power Apps portal

This Australia based company is a one-stop-shop for Indigenous businesses and entrepreneurs to build their capability and connect to a wide range of business opportunities available throughout NSW.

Worked as an CRM resource to implement their Customer Service Self Help Portal.

Dynamics 365 Integration with Envoy (January 2020 – February 2020)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Azure Application Services,
- CRM Customization,
- Workflows,
- Envoy Webhooks

This Australia based aims to lead the provision of education, employment, and business opportunities for Aboriginal and Torres Strait Islander Australians by working together to empower and build capacity amongst individuals, their families, and their communities.

Worked as a CRM resource to integrate Dynamics CRM 365 with

Dynamics 365 Customer Service Self Help Portal (April 2020 – June 2020)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- CRM Customization,
- Power Automate,
- Power Apps portal,
- Workflows

This Australia based company is here to assist the Indigenous business sector thrive in WA. They provide support to Aboriginal and Torres Strait Islander people wanting to start, grow or sustain their businesses.

Worked as an CRM resource to implement their Customer Service Self Help Portal.

Dynamics 365 Integration Cannon Uniflow (February 2020 – March 2020)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Azure Application Services,
- CRM Customization,
- Workflows,
- Cannon Uniflow MySQL Database

This Australia based aims to lead the provision of education, employment, and business opportunities for Aboriginal and Torres Strait Islander Australians by working together to empower and build capacity amongst individuals, their families, and their communities.

Worked as a CRM resource to integrate Dynamics CRM 365 with Cannon Uniflow to push various data into CRM from its my SQL server.

Also created several workflows and entities to manage the data on CRM side and create relationships

Dynamics 365 Enhancement (January 2020) (Small Project)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Power Bi,
- CRM Customization,
- Workflows

This UK-based company provides IT solutions to other companies. Worked as CRM resource to enhance CRM functionalities and implemented some entities to support power BI reporting and created new two dashboards to display engineers and customers report.

Envoy to push various data into CRM such as visitors, prospects, Desks and Deliveries.

Also created several workflows and entities to manage the data on CRM side and create relationships

Dynamics 365 Enhancement (December 2019 – January 2020) (Small Project)

Technologies used within the project:

- MS CRM Dynamics 365 On-Premise,
- CRM Customizations,
- Plugins,
- Workflows

Provided support to this UK-based company. Worked as CRM resource to customize their existing business logic and implement some new automations. Implemented some Plugins and code activities.

Dynamics 365 Enhancement (October 2019 – November 2019)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Plugins,
- CRM Customizations
- CRM SDK's
- JavaScript,
- Workflows,
- Business Process flows.

This UK-based company manages property business and appointments using dynamics 365. Worked as CRM resource to enhance CRM functionalities as per their business logics and schedules. Made several customizations in their Sales and Service module also created new entities and forms

CRM Upgrade from 2013 to Dynamics 365 (June 2019 – July 2019)

Technologies used within the project:

- MS CRM Dynamics 365 On Premise,
- C# Application,
- CRM Customizations,
- CRM SDK's,
- Plugins,
- Workflows.

A US based company works for a global supplier of paints, coatings, and specialty materials. Worked as a CRM resource to integrate their Shopping Site with CRM. As their site generates an XML file which contains detailed records of their daily business.

Created a scheduled application to read XML files from an FTP server and store appropriate records in appropriate entities in CRM, it also created an error log on local server and CRM.

Dynamics 365 Customizations (August 2019 – September 2019)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Plugins,
- CRM Customizations,
- CRM SDK's,
- JavaScript,
- Workflows.

This UK-based company organizes sports activities for children. Worked as CRM resource to implement their business logics and performed several customizations in CRM to improve their data management and flow. Created several custom forms, entities, and HTML web resources.

Dynamics 365 Enhancement (July 2019 – August 2019) (Small Project)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- CRM Customizations
- JavaScript,
- Workflows,
- Marketing email automation.

This UK-based company provides IT solutions to other companies. Worked as CRM resource to customize their Marketing module. Also worked on Marketing Email Automation made several templates for sending out emails and schedule activities as per their annual cycle.

Windows 10 IOT Core UWP Application for VMS display (June 2019 – June 2019)

Technologies used within the project:

- Azure IOT,
- C# UWP Application,
- Windows 10 IOT Core,
- Raspberry Pi 3B, 3B+, 4.

This India based company works on VMS display boards manufacturing and installations they require a module with an UWP application which can provide HDMI output to their VSM boards and can display images, videos, and texts through a web portal as schedule, and should be able to send notifications to the board.

Dynamics 365   Dataverse   PowerApps   Power Automate   Microsoft Azure

CRM Data Migration from 2015 to Dynamics 365 (June 2019 – June 2019) (Small Project)

Technologies used within the project:

- SSIS Tools,
- CRM Customizations,
- Workflows.

UK based company owns a business providing unrivalled knowledge, intelligence and connectivity for family businesses, family offices and significant private investors worldwide. Worked as a CRM resource to migrate their data from CRM 2015 to Dynamics 365.

Integrated Dynamics 365 with Square POS (February 2019 – May 2019)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Workflows,
- CRM Customizations,
- JavaScript,
- Microsoft flow,
- CRM SDK's,
- Square POS Services.

US based company The International Society for Krishna Consciousness wants their CRM to be fully integrated with Dynamics 365. Worked as a CRM resource using Agile methodology to add new functionality in the CRM to improve the user experience and better data flow and created multiple Microsoft flows to integrate Dynamics 365 with Square POS in which the Contacts, Accounts, Invoices should be in Sync with each other and applied multiple deduplication rules to avoid customers duplicity.

Dynamics 365 Enhancement (August 2018 – October 2018)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Business Process Flows,
- Plugins,
- CRM SDK's,
- JavaScript,
- Workflows.

UK based company providing services like installation/commissioning of hardware, software and system trouble shooting. Worked as CRM resource to implemented multiple BPF's, plugins and workflows.

Created new dashboards and Email templates.

Enhanced their current system functionalities as per their requirements.

CRM Upgrade from 2013 to Dynamics 365 (March 2019 – May 2019)

Technologies used within the project:

- MS CRM Dynamics 365 On Premise,
- Plugins,
- Workflows,
- CRM SDK's,
- CRM Customizations,
- Code Activity's,
- HTML web resources,
- JavaScript.

A US based company works for Pennsylvania courts to manage Judicial information and Criminals records. Worked as a CRM resource to refractor their plugins, Workflows, HTML web resources and JavaScript's to work with Dynamics 365.

CRM 2016 Enhancement and Customization's (November 2018 – January 2019)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Plugins,
- Code Activity's,
- CRM SDK's,
- JavaScript,
- Workflows,
- HTML web resources.

UK based company providing unrivalled knowledge and intelligence to a community of the world's wealthiest families, their family office and ultra-high net Skills. Worked as CRM resource to add new business functionalities and implement their business logics.

Also worked on assigning new security roles to their team member and users.

CRM 2016 Enhancement and Customization's (March 2018 – July 2018)

Technologies used within the project:

- MS CRM Dynamics 365 Online,
- Plugins,
- CRM SDK's,
- JavaScript,
- Workflows.

This UK based company is specialist in ERP's systems and providing managed IT solutions. Worked as CRM resource to implement their business logics in CRM improve their data flow, created recursive workflows to send email reminders on weekdays only. Added dialog boxes for better user experience and data management.

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