# How to Deploy and Configure Dynamics 365 Banking Portal

## Pre-Requisites

* Dynamics 365 Online Instance with Sales Application
* Microsoft Dynamics 365 Banking Accelerator v1.0.3.1
* Configuration Migration Tool

## Steps to Install Dynamics 365 Banking Portal

The Banking Portal requires some setup to meet your needs. This document provides step-by-step instructions to deploy and configure the application.

### Download following solution files from GitHub release for Dynamics 365 Banking Accelerator

<https://github.com/microsoft/Industry-Accelerator-FinancialServices/releases/tag/1.0.3.1>

* FinancialServicesCommonAccelerator\_1\_0\_3\_1\_managed.zip
* FinancialServicesCommonAcceleratorSales\_1\_0\_3\_1\_managed.zip

### Download following files from GitHub sample apps for banking

<https://github.com/microsoft/Industry-Accelerator-FinancialServices/tree/master/apps/samplecode>/portals/banking

* FinancialServicesAcceleratorPortal\_1\_0\_0\_0\_managed.zip
* Financial Services Portal Data Export.zip
* FSIBI.PBIX (Optional)
* Sample Data.zip (Optional)

### Import Main Solutions

Import main solutions in the following order (refer to the section below on **How to Import a Solution File**)

1. FInancialServicesCommonAccelerator\_1\_0\_3\_1\_managed.zip
   1. This solution contains the entities, forms, and views used across the accelerator. This solution does not have any dependencies on the Sales module, so no connection to Contact, Account, Opportunity or Lead is made.
2. FInancialServicesCommonAcceleratorSales\_1\_0\_3\_1\_managed.zip
   1. This solution contains Banking Updates that are dependent on the Sales Solution
   2. Dependencies: Dynamics 365 Sales Application
3. FinancialServicesAcceleratorPortal\_1\_0\_0\_0\_managed.zip
   1. This solution contains the entities, forms, and views used by Banking Portal

### Install Configuration Migration Tool folder

Instructions on obtaining this tool can be found below: (if you already have the tool, skip to next step)

* 1. <https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/download-tools-nuget>
  2. <https://docs.microsoft.com/en-us/power-platform/admin/manage-configuration-data>

### Import Sample Data

Import sample data file **Sample Data.zip** using above Configuration Migration Tool by following steps in section “How to Import data package with Configuration Migration Tool”

### Configure Banking Portal

1. Change allowed file types in your dynamics system to allow “.js” files before setting up the portal
   1. Navigate to **Advanced Settings** from Dynamics 365 Application
   2. Navigate to Settings > **Administration**, then select System Settings.
   3. On the **General** tab find the Set blocked file extensions for attachments and within this long list **locate js** and **remove** it and the trialing semi-colon.
   4. Select **OK** to save the System Settings.
2. Stand up **new Power Apps Portal** with Portal Template = Customer Self-Service
3. Import **Financial Services Portal Data Export.zip** using above Configuration Migration Tool by following steps in section “How to Import data package with Configuration Migration Tool”
4. **Clear** your portal cache
5. Setup **Sample Portal User** - the sign in page defaults to Betty Welch (username:bwelch password:Banking!23). This user will need to be setup with the exact username and password.
   1. In your org, open **Dynamics 365 Portal App**
   2. Go to **Contacts**
   3. Select Betty Welch
   4. Switch to **Portal Contact Form** for Betty
   5. Click **Web Authentication** **Tab**,
   6. Set **username** to bwelch
   7. Click “**Change Password**” button in the toolbar, and change her password to be Banking!23

### Optional – Import and Setup Power BI Sample Report for the Banking Portal

Setup Power BI Integration to allow you to embed a Power BI dashboard onto the banking portal: https://docs.microsoft.com/en-us/powerapps/maker/portals/admin/set-up-power-bi-integration

* 1. **Import the** **FSIBI.PBIX** file that you downloaded to an appropriate PowerBI workspace (if you do not have an existing workspace, you will need to create a new one): <https://docs.microsoft.com/en-us/power-bi/service-desktop-files>
  2. **Open the report**, and copy the URL shown in the url bar at the top
  3. In your org, open **Dynamics 365 Portal App**
  4. Go to **Web Templates** and Open the “**My Mortgage**” record.
  5. Under “**source**”, locate the following line:

*{% powerbi authentication\_type:"powerbiembedded" path:"https://app.powerbi.com/groups/0e4cdb3c-e968-4844-949f-8cc689229920/reports/35253001-91bd-4f87-9528-e35a87621757/ReportSection" %}*

* 1. **Replace** the “path” attribute with the URL you copied.
  2. **Save** the record
  3. **Clear portal cache** and navigate to the Portal -> My Mortgage page to ensure the report shows

### Optional – Configure Chat Bot

Omni-channel capabilities are supported in the banking portal, but end-to-end working is not included in this installation guide.

Install Omnichannel in environment following these steps: <https://docs.microsoft.com/en-us/dynamics365/omnichannel/administrator/omnichannel-provision-license>

1. To Provision, you will need an Admin Role
2. You will need to run through the setup twice for it to work
3. This takes about 2 hours

## Portal Call-to-Action

Some features of the portal have been developed for specific use cases and are documented here.

1. Create button on Appointments does not invoke any action.
2. Buttons in Power BI views (Defer next payment, Make additional payment, Change payment frequency, change payment account) are dummy CTAs and do not invoke any action.
3. All views are read-only. Ex- editing the Profile or submitting Contact Us form does not write to the system.

# Appendix

## How to Import a Solution File

To manually import a main solution:

1. Navigate to <https://make.powerapps.com/home> > Select your Environment > Click Solutions in left-hand Navigation.
2. Click Import button in ribbon.
3. Click Choose File button and select managed solution zip file.
4. Click Open button.
5. Click Next through all steps and then Import.

## How to Import data package with Configuration Migration Tool

To Import an additional solution using the Configuration Migration Tool:

1. After obtaining the Configuration Migration tool, navigate to the folder where the tools were extract and open the Configuration Migration tool folder (Structure should resemble \Tools\ConfigurationMigration)
2. Run “DataMigrationUtility”.
3. To Import:
   1. Select “Import Data”.
   2. Connect to the org to import the data to.
   3. Select the appropriate data zip file (should be named “DataPackage.zip”).
   4. Perform the import.