Microsoft

28 SEPTEMBER

365 Saturday

FREE TICKETS,
LIMITED CAPACITY

DYNAMICS POWER!
VICTORIA 365

VICTORIA'S ANNUAL
BUSINESS APPLICATIONS
TECHNICAL CONFERENCE BY
365 SATURDAY

Getting started with PowerApps Portals

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Power Platform Consultant
365 Saturday Ambassador

Microsoft

dantas.ca

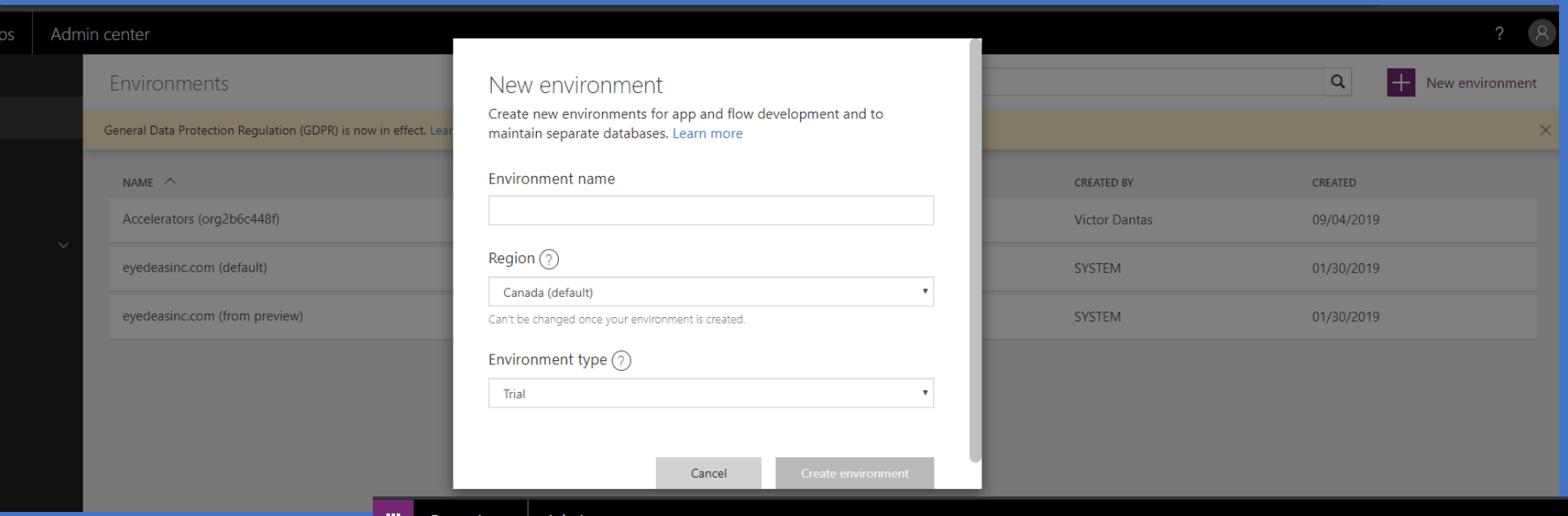
Session Topics Overview

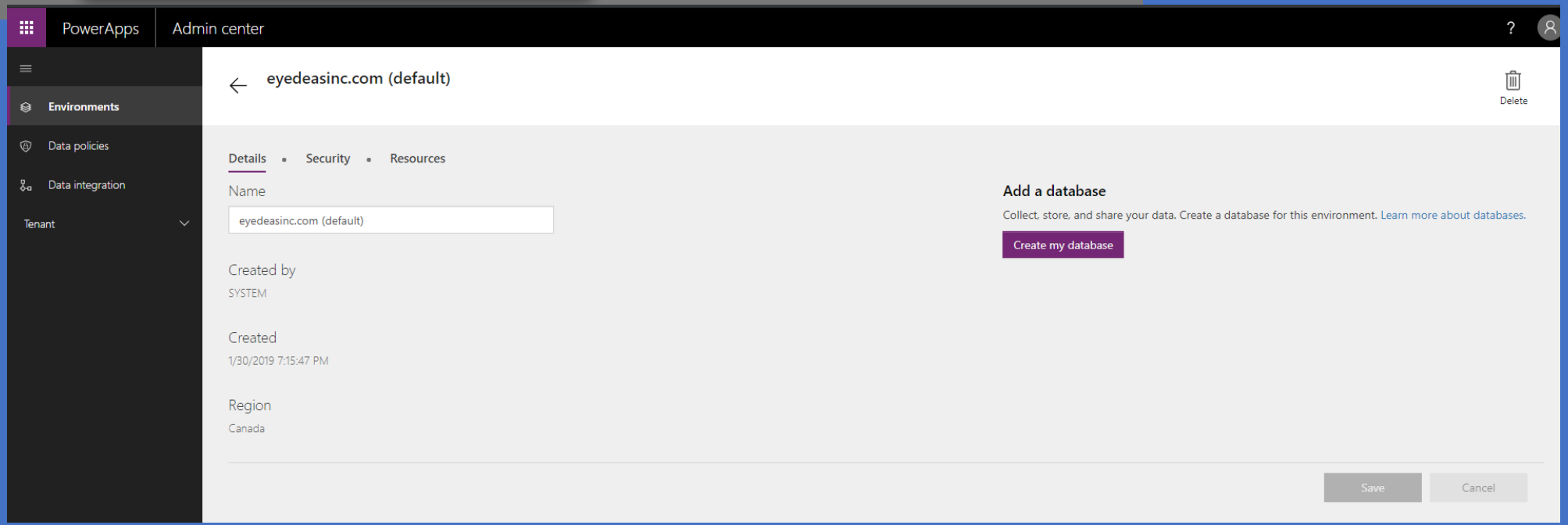
- How to provision?
- PowerApps Portals CMS and Multi-Language Support
- CSS Branding / Samples
- Site Settings, Site Markers, and Content Snippets
- Entity Forms, Entity Views, Entity Permissions, WebForms
- Liquid Tags / Web Templates
- A few samples
- PowerApps Portals DevOps
- Q&A

How to provision a Portal

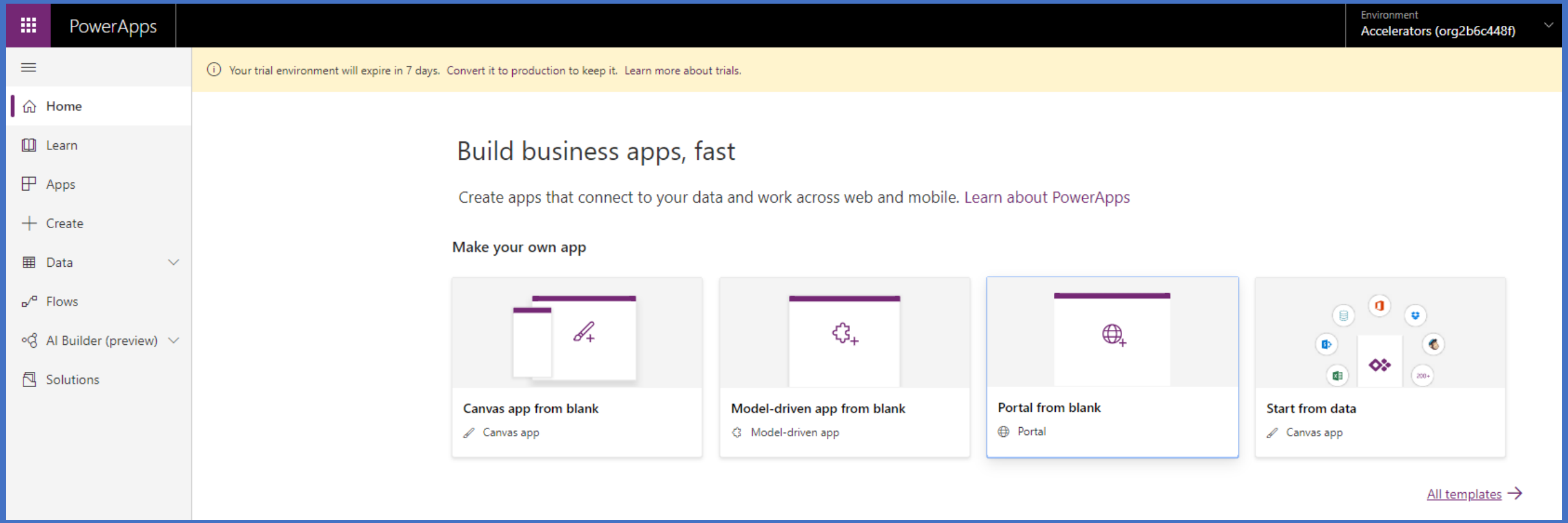
- Prerequisites
  - CDS Environment;
    - https://admin.powerapps.com
  - CDS Database;
- PowerApps Portal
  - https://make.powerapps.com

CDS Environment & Database

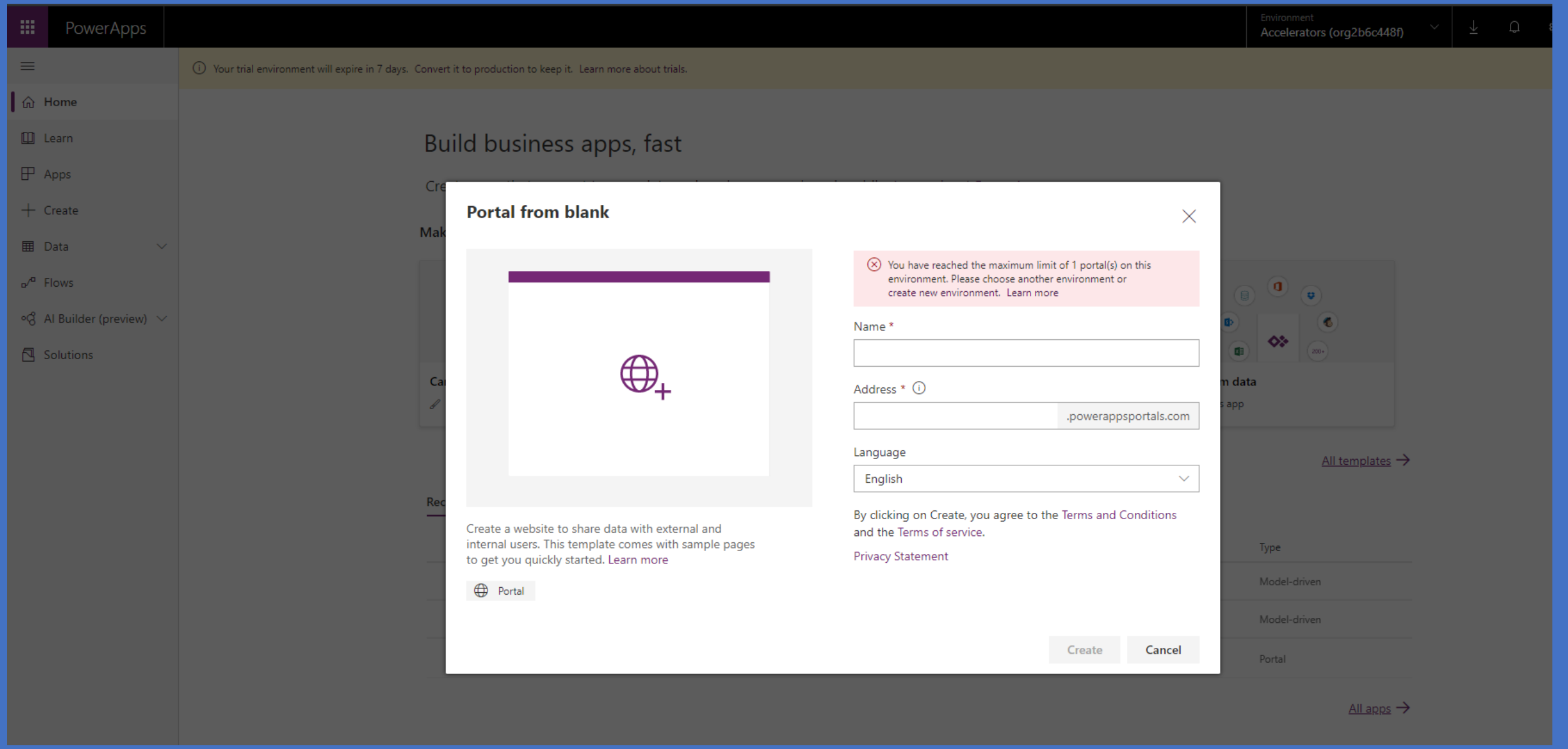




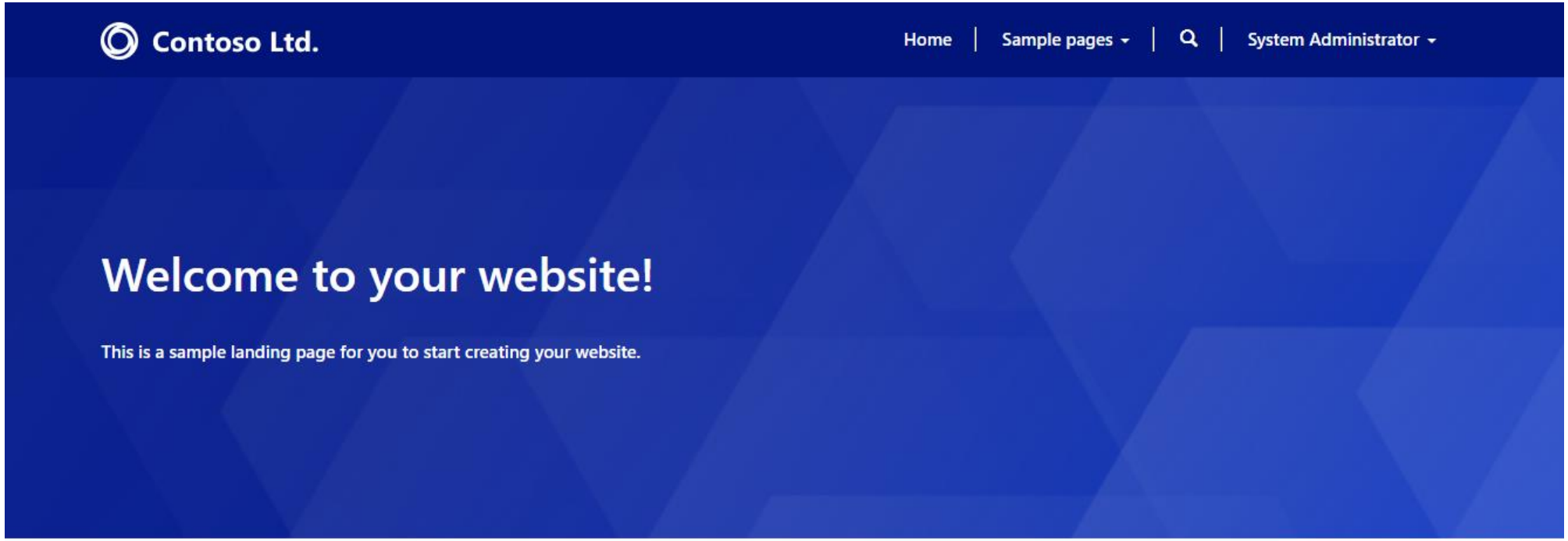
How to provision a Portal



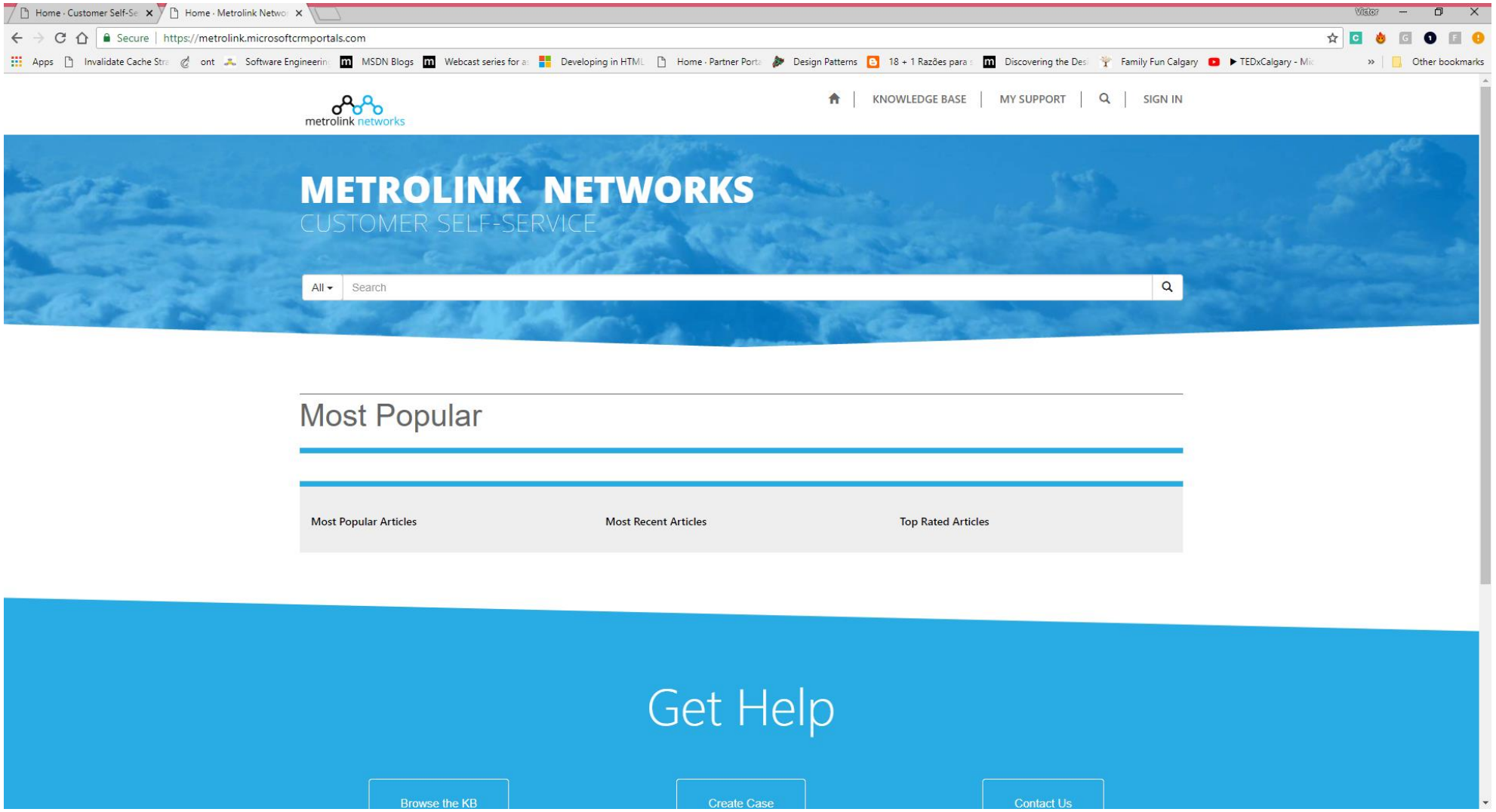
How to provision a Portal



First Glance - CMS and Multi-Language Support

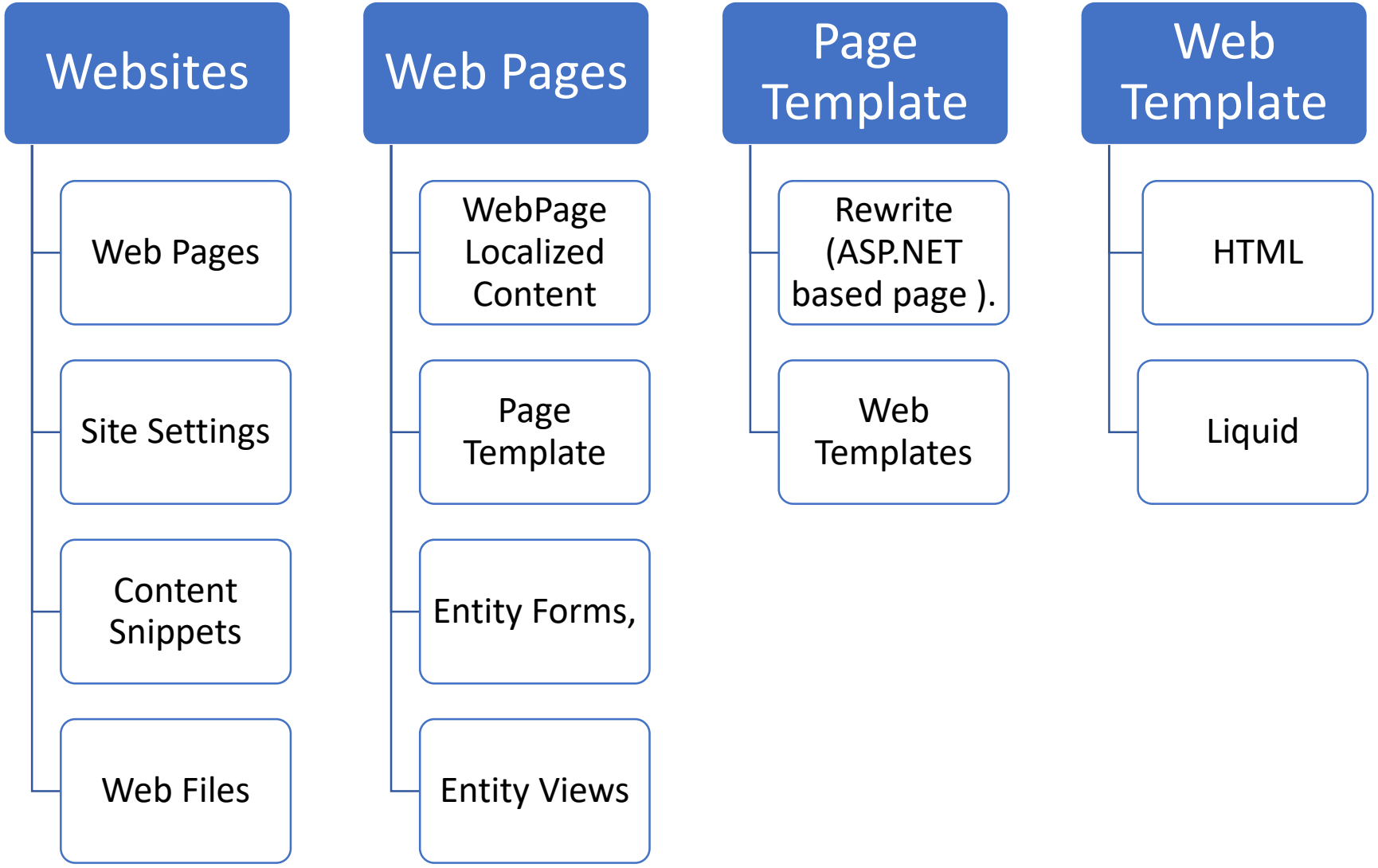


Portal Branding

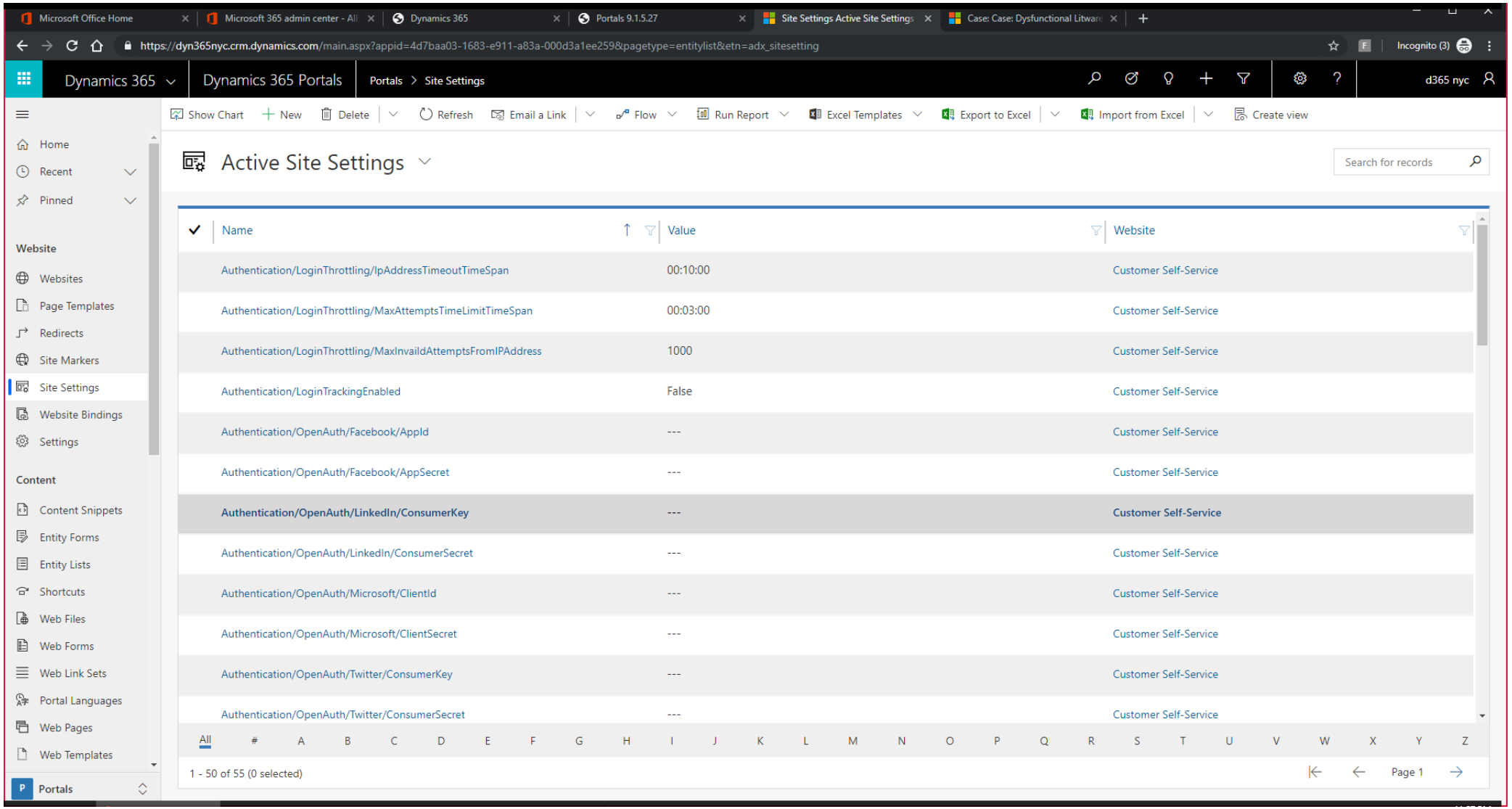


Portal Components

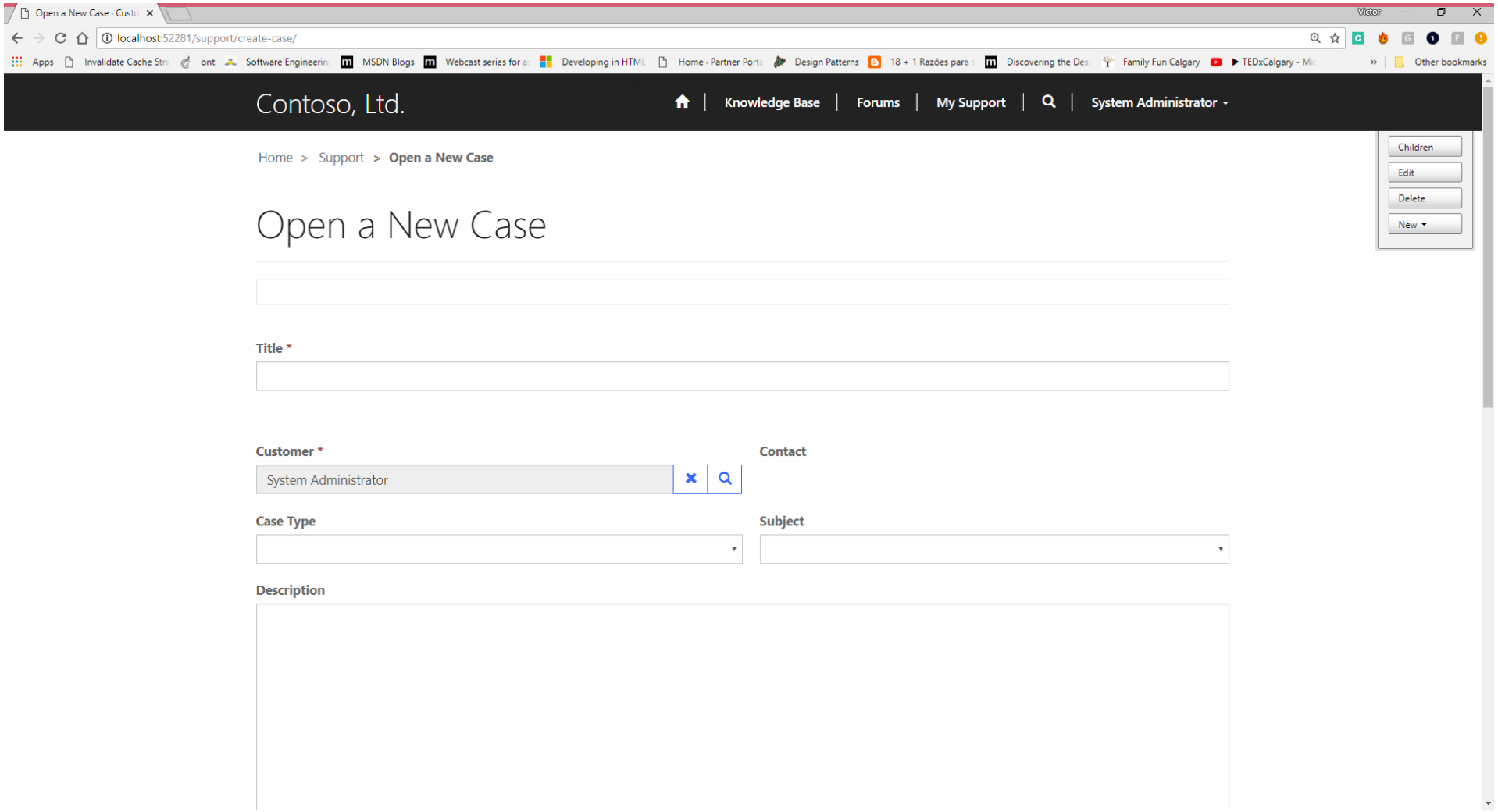
What is going on behind the scenes?



Site Settings, Site Markers and Content Snippets



Entity Forms, Entity Views, Entity Permissions and Web Forms



Entity Forms, Entity Views, Entity Permissions and Web Forms

- Entity List Sample
- Entity Form Sample
- Entity Permission
  - Global, Contact, Account, and Parent

Liquid / Web Templates

WEB TEMPLATE : INFORMATION

Footer

General

Name * **Footer**

Website * **Custom Portal**

Source

```
<section id="gethelp" class="page_section section-diagonal-right color-inverse {% substitution %}{% if page %}{% unless page.parent %}home-section{% endunless %}{% endif %}{% endsubstitution %} hidden-print">
  <div class="container">
    <div class="row">
    </div>
  </div>
</section>

<footer role="contentinfo">
  <div class="footer-top hidden-print">
    <div class="container">
      <div class="row">
        <div class="col-md-6 col-sm-12 col-xs-12 text-left">
          {% editable snippets 'About Footer' type: 'html' %}
        </div>
        <div class="col-md-6 col-sm-12 col-xs-12 text-right">
          <ul class="list-social-links">
            <li><a href="#"><span class="sprite sprite-facebook_icon"></span></a></li>
            <li><a href="#"><span class="sprite sprite-twitter_icon"></span></a></li>
            <li><a href="#"><span class="sprite sprite-email_icon"></span></a></li>
          </ul>
        </div>
      </div>
    </div>
  </div>

  <div class="footer-bottom hidden-print">
```

MIME Type --

Active

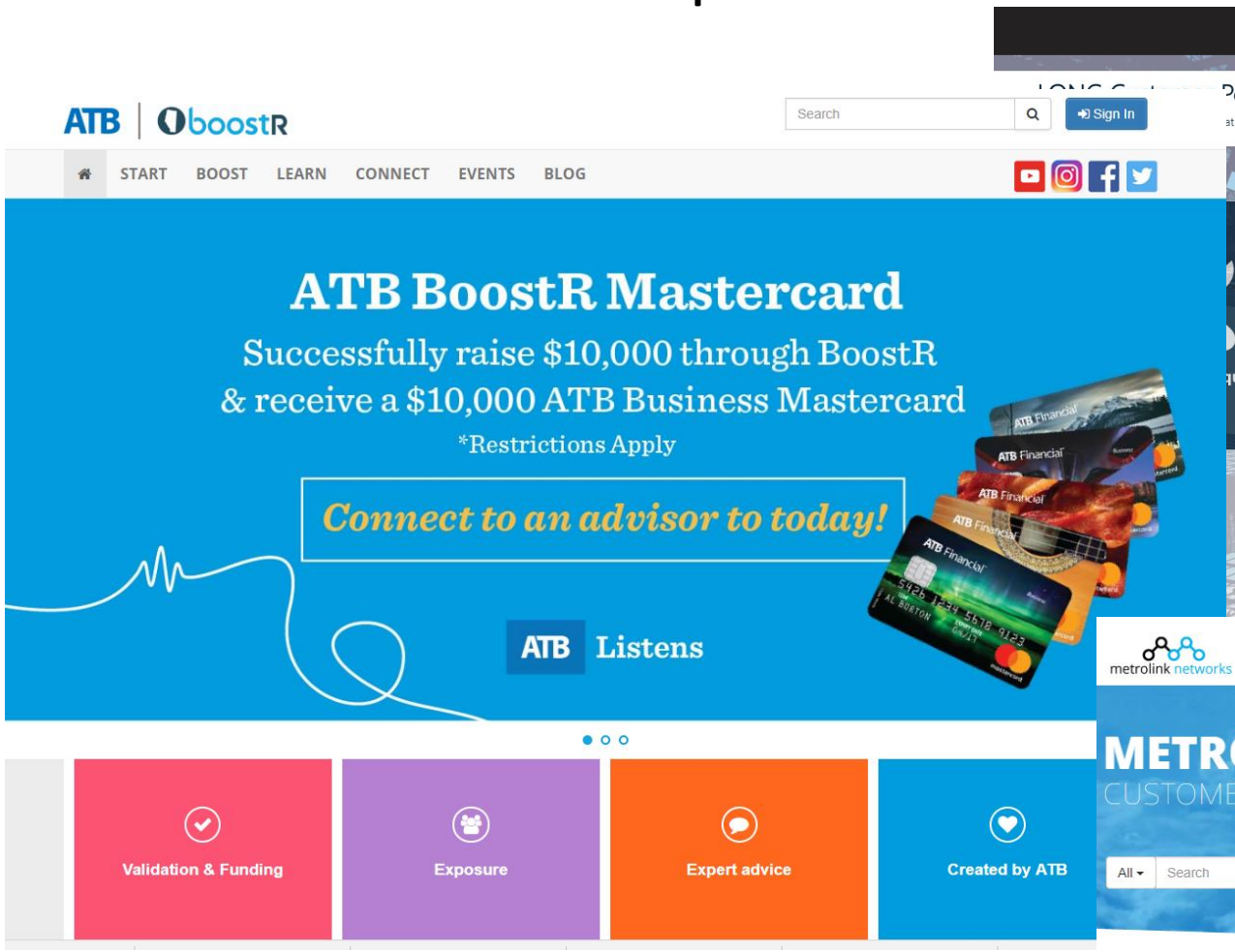
Liquid

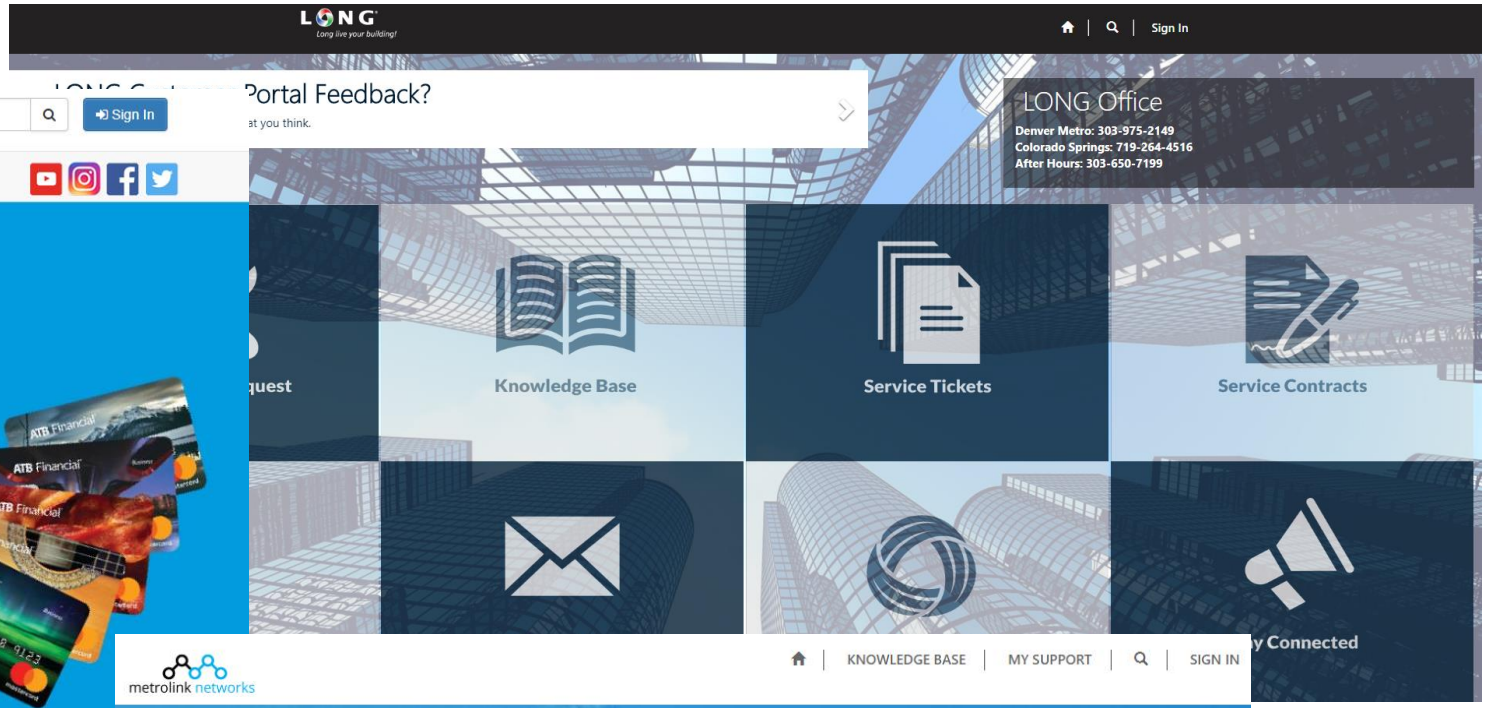
- Template programming language created by Shopify;
  - https://help.shopify.com/en/themes/liquid
- Liquid .NET
  - https://github.com/mikebridge/Liquid.NET
- PowerApps Portals Liquid Objects
  - https://docs.microsoft.com/en-us/dynamics365/customer-engagement/portals/liquid-objects
- Main objects
  - page
  - entities : *Allows access to any CDS entity by ID*
  - now: *Renders current UTC time*
  - params : *Shortcut to request.params*
  - settings : *Allows access to Portal site settings*
  - snippets*: Allos access to Portal snippets*
  - user *: Refers to the portal user record and its data attributes*
  - **Other dynamic tags** *: chart, powerbi* (requires portal configuration), editable, entityform, entitylist, entityview,*
    - https://docs.microsoft.com/en-us/dynamics365/customer-engagement/portals/dynamics-entity-tags

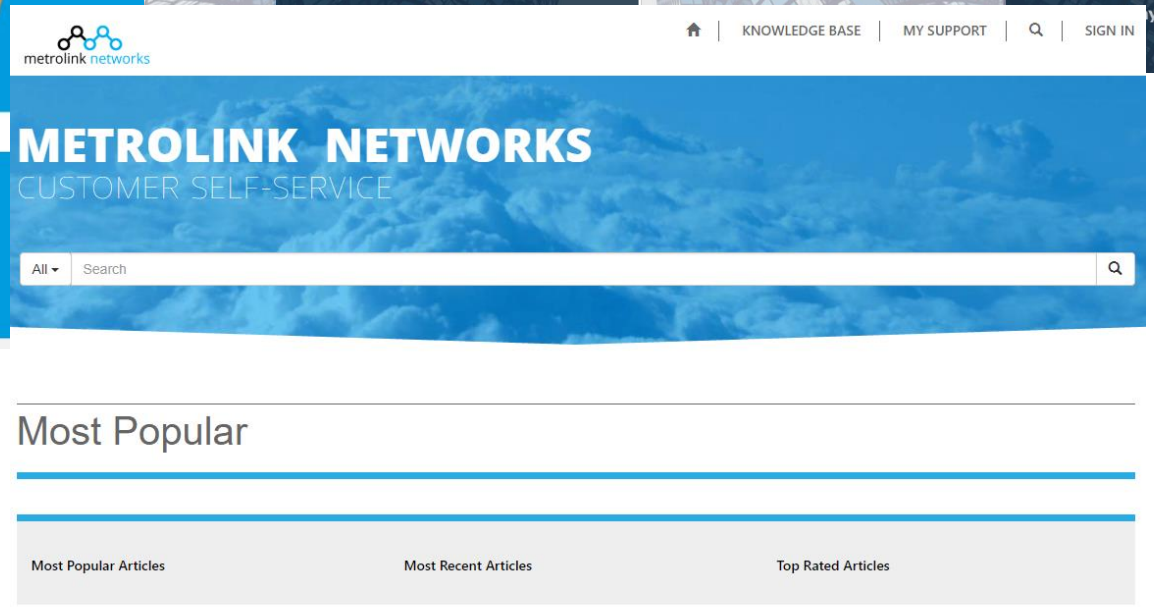
Liquid Sample

Rendering User and CE Chart

Cool Portal Samples

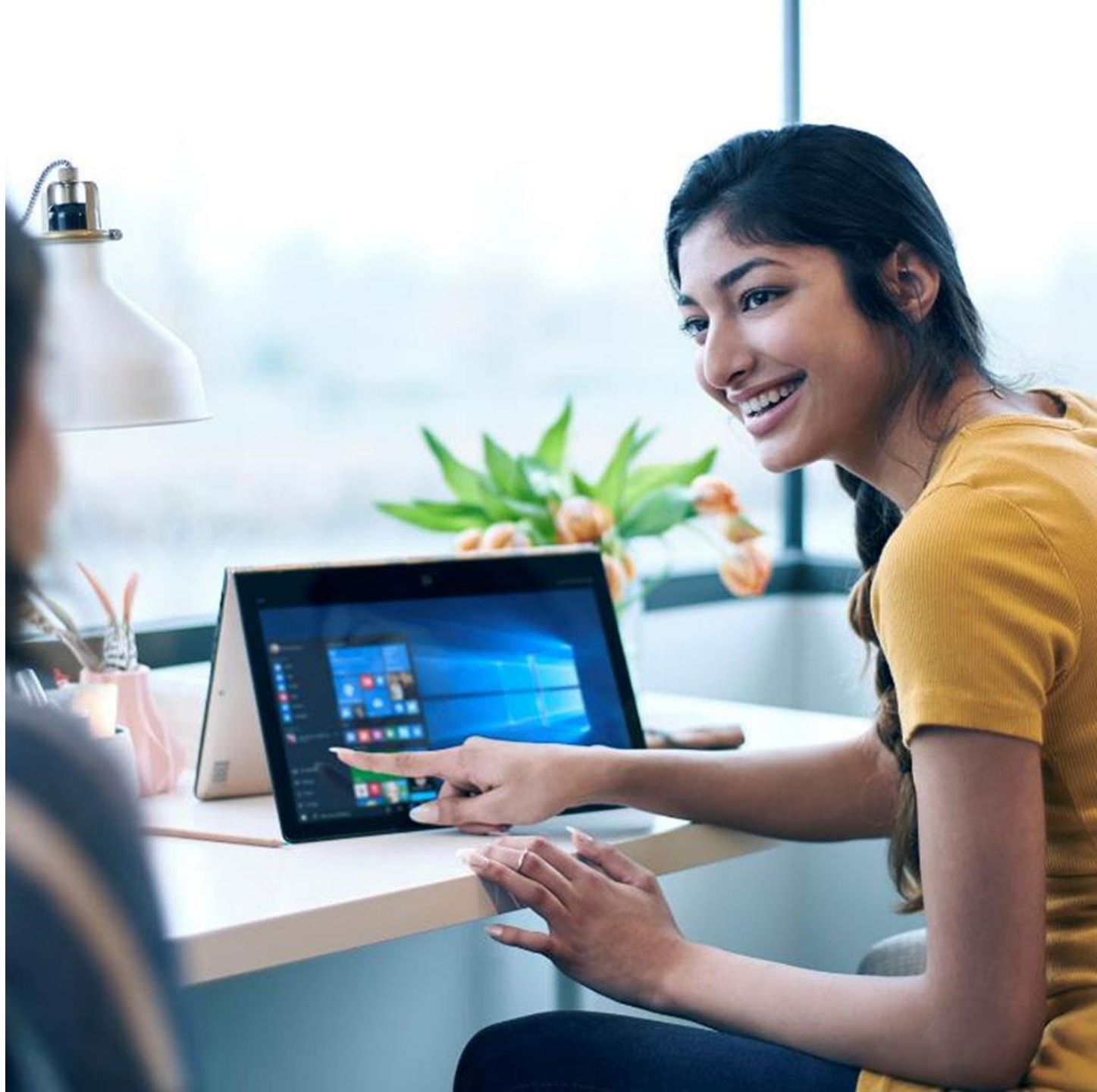






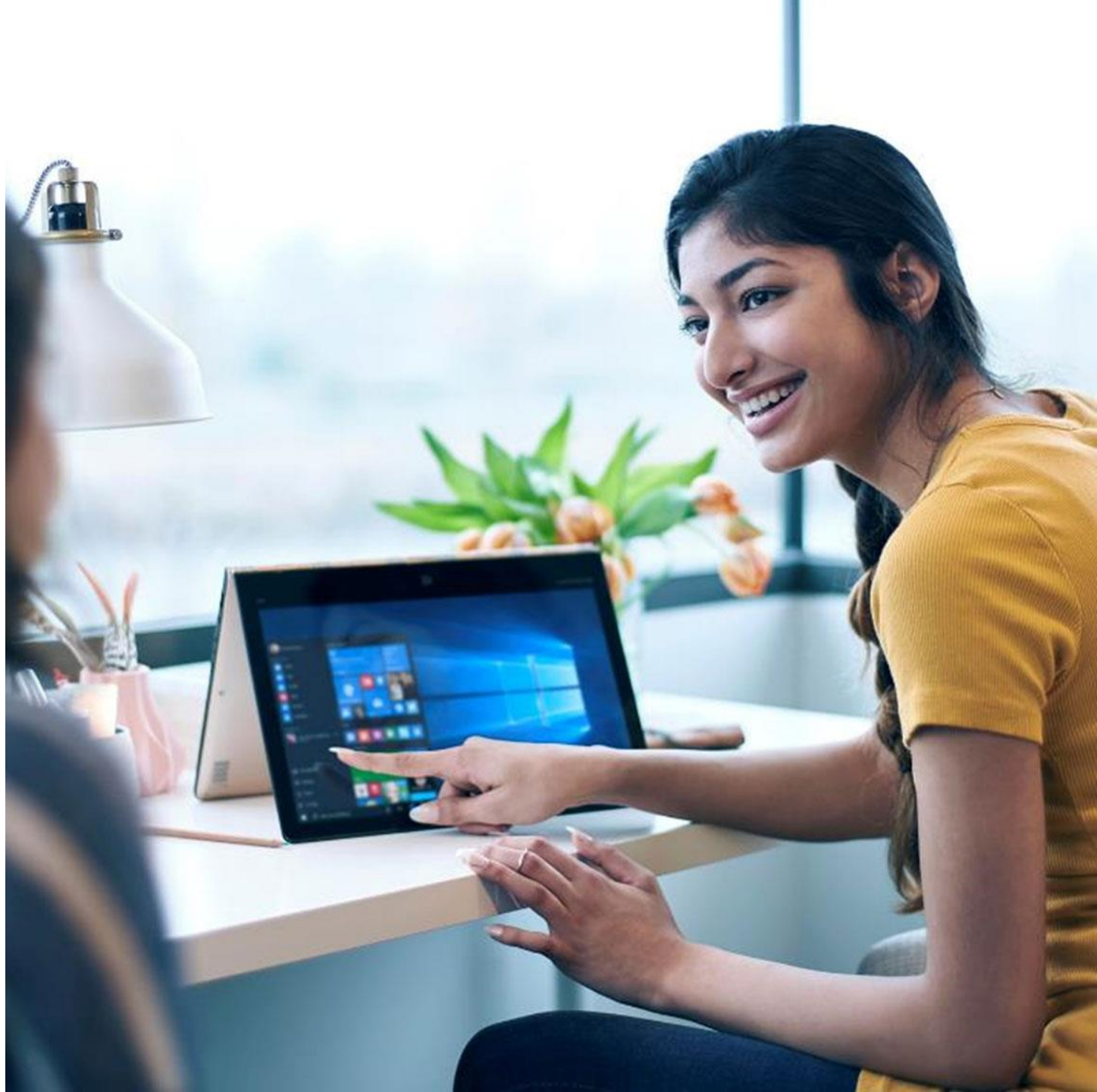
Dynamics 365 Portals DevOps

- TFS/Git for Source control
- Custom Kingsway soft SSIS packages to move/copy Portal config data;
- James Novak – PortalRecordsMover tool
- Console: https://github.com/jamesnovak/PortalRecordsMoverConsole
- XrmToolBox: https://www.xrmtoolbox.com/plugins/MscrmTools.PortalRecordsMover/



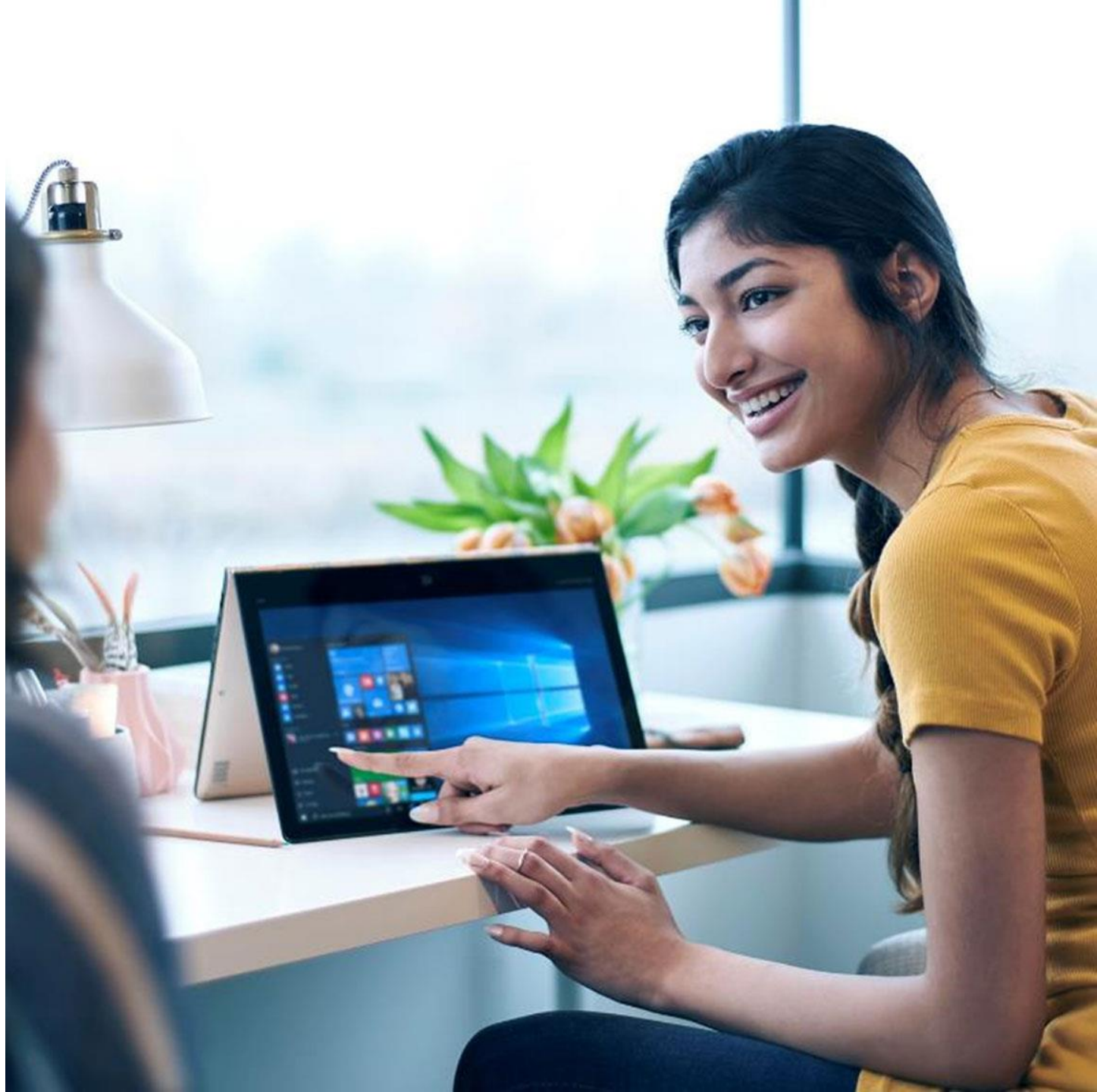
PowerApps Portals Other open-source projects

- PowerApps Portals – D365 Webapi Wrappers
- https://github.com/dantasvictor/PowerAppsPortalsWebAPI
- PowerApps Portals Accelerators
- PowerApps Portals AzureDevOps CI/CD task – Eugene van Staden



Dynamics 365 Portals DevOps – Common Scenario

1. Create your script using James Novak PortalRecordsMoverConsole;
2. Save it to an Xml export file;
3. Store the it in Source Control;
4. Upon commit execute another script using James Novak PortalRecordsMoverConsole to push the changes to another environment; (CI);



- # Follow the stars (and me)
  - James Novak : https://futurezconsulting.com/tag/portals/
  - Colin Vermander : https://colinvermander.com/tag/crm-portals/
  - Nicholas Hayduk : https://www.engineeredcode.com/blog
  - Nick Doelman : http://readyxrm.blog
  - Raz Dynamics and 365 Community: https://www.365portal.org/
  - **Victor Dantas: https://community.dynamics.com/crm/b/powerapps-4-devs**

Q&A

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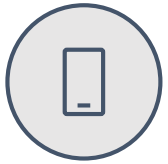
The Power of Community

"As iron sharpens iron, so a friend sharpens another"

Thanks!

Email: victor@eyedeasinc.com
Blog: dantas.ca



Phone: 403-926-3834

Dynamics 365 Community

Join the Dynamics 365 Community, where you can interact with your peers and Microsoft Dynamics 365 experts. You can get answers to your questions by posting questions in the forums, starting discussions, reading informative blog articles, and watching how-to videos.

https://community.dynamics.com

Benefits

- Participate and help build a pool of knowledge that's accessible by members at any time!
- Expand your network by engaging with peers

Involvement

- Need help? Ask questions and join in on business or technical discussions in the forums
- Share your expertise by hosting a blog or syndicating your existing blog

Recognition

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- Become a Community Star and earn appreciation from peers

Join Today!

- Get answers, find inspiration, connect with others
- Free membership
- **Any questions? Email us at dlcommed@Microsoft.com**

Microsoft

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- **www.365portal.org**
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- **Linkedin: @365-Saturday**

- **Hashtags**
- **#D365SaturdayVictoria #365Saturday #msdyn365**

- **Wifi: TBC**
- **Pass: TBC**

- **Community.Dynamics365.com**

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- **We really value your feedback. Log-in to the 365portal event page and click on the session title.**
- **Make sure you have added the session to your schedule and you have checked in.**
- **You can now leave feedback which will help the speaker and improve our future events for the community.**

Home > Events > **DynamicsPower! 365 Saturday South Africa**

DynamicsPower! 365 Saturday South Africa

DynamicsPower! 365 Saturday South Africa is coming to Johannesburg on the 17th August delivering 3 Tracks of Deepdives into Dynamics 365 CE, Fin and internationally renowned MVPs. Modelling with the Principle Product register for and is completely free ho

WHEN

17 August 2019

1 day, 18 hours and **49 minutes**

ADD TO SCHEDULE/CHECK IN

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SESSION OVERVIEW

This session which explains the functionality, purposes the organization hierarchies (level 200/300).

WHAT TIME

15:00 - 16:00

EVENT

DynamicsPower! 365 Saturday South Africa

OmniChannel Engagement Hub, A Cool New Tool...but not a USD Killer

Session Added: View your event schedule

ADD TO SCHEDULE/CHECK IN

Remove from my event schedule | Check in to session

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WHAT TIME

14:00 - 14:50

EVENT

365 Saturday Amsterdam 2019

OmniChannel Engagement Hub, A Cool New Tool...but not a USD Killer

Please provide your feedback for this session!

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View your event schedule

WHAT TIME

14:00 - 14:50

EVENT

365 Saturday Amsterdam 2019

SPEAKER

Neil Parkhurst

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Rating *

Comments

I learnt a lot about the new Session Management Feature and support for Chrome and Edge which will be really helpful in our callcentre

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Submit Feedback

Agenda

Time	Grand Room	Lab
09:00 – 10:00	Keynote – Evan Chaki	
10:10 – 11:10	Intro to PowerApp AI Builder – Julie Yack	Building a PowerApp in an hour – Eric Sauvé
11:10 – 12:10	D365 for Field Service and IoT Introduction – Maximize your technician efficiency – Lucas Dias	Connecting Dotnet Core to MS Dynamics 365 – George Walker
12:10 – 1:00	Lunch Break	
1:00 – 2:00	Dynamics 365 for Talent – Roque Daudt	Canvas Apps - Best Practices for performance improvements – Eric Sauvé
2:10 – 3:10	Upgrading of Dynamics 365 Classic to UCI – Julie Yack	Getting Started with PowerApps 365 Portals – Victor Dantas
3:10 – 4:15	Close & Swag	