



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

Victor Dantas
Power Platform Consultant
365 Saturday Ambassador



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

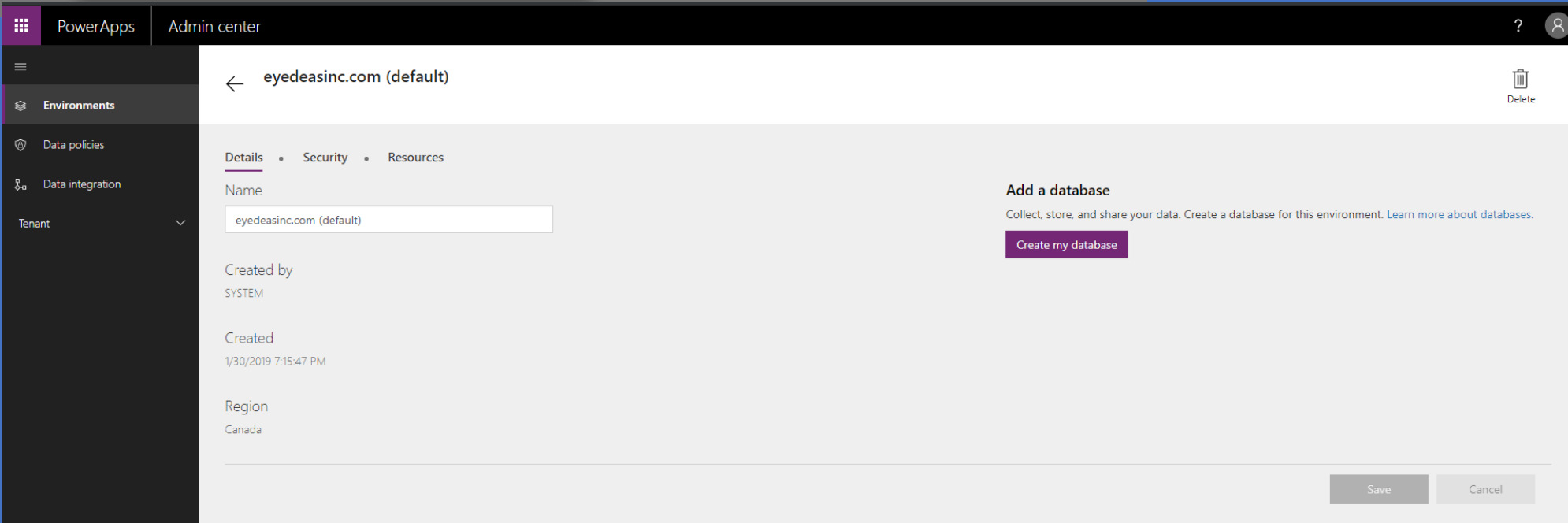
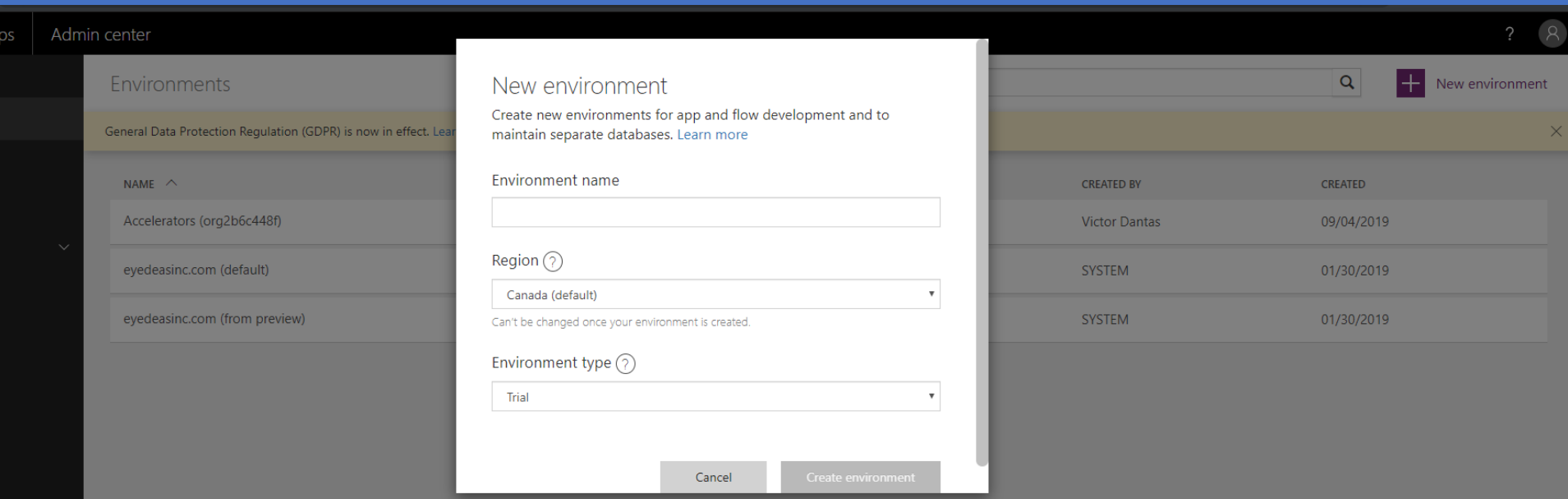


How to provision a Portal


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



CDS Environment & Database



How to provision a Portal



PowerApps

☰

Home

Learn

Apps

Create

Data

Flows

AI Builder (preview)

Solutions


Environment
Accelerators (org2b6c448f)


ⓘ Your trial environment will expire in 7 days. Convert it to production to keep it. [Learn more about trials.](#)

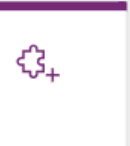
Build business apps, fast


Create apps that connect to your data and work across web and mobile. [Learn about PowerApps](#)


Make your own app




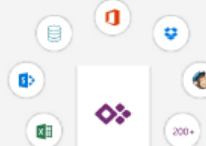
Canvas app from blank
 Canvas app




Model-driven app from blank
 Model-driven app



Portal from blank
 Portal



Start from data
 Canvas app

[All templates](#) →

How to provision a Portal

PowerApps

Environment: Accelerators (org2b6c448f)

Your trial environment will expire in 7 days. Convert it to production to keep it. [Learn more about trials.](#)

Build business apps, fast

Create

Make

Record

Home

Learn

Apps

Create


Data

Flows


AI Builder (preview)

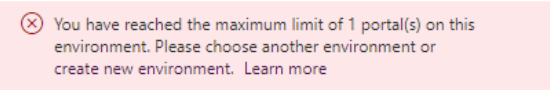
Solutions

Portal from blank




Create a website to share data with external and internal users. This template comes with sample pages to get you quickly started. [Learn more](#)

 Portal



Name *

Address * 

Language

English

By clicking on Create, you agree to the [Terms and Conditions](#) and the [Terms of service](#). [Privacy Statement](#)

Create Cancel

All templates →

Type

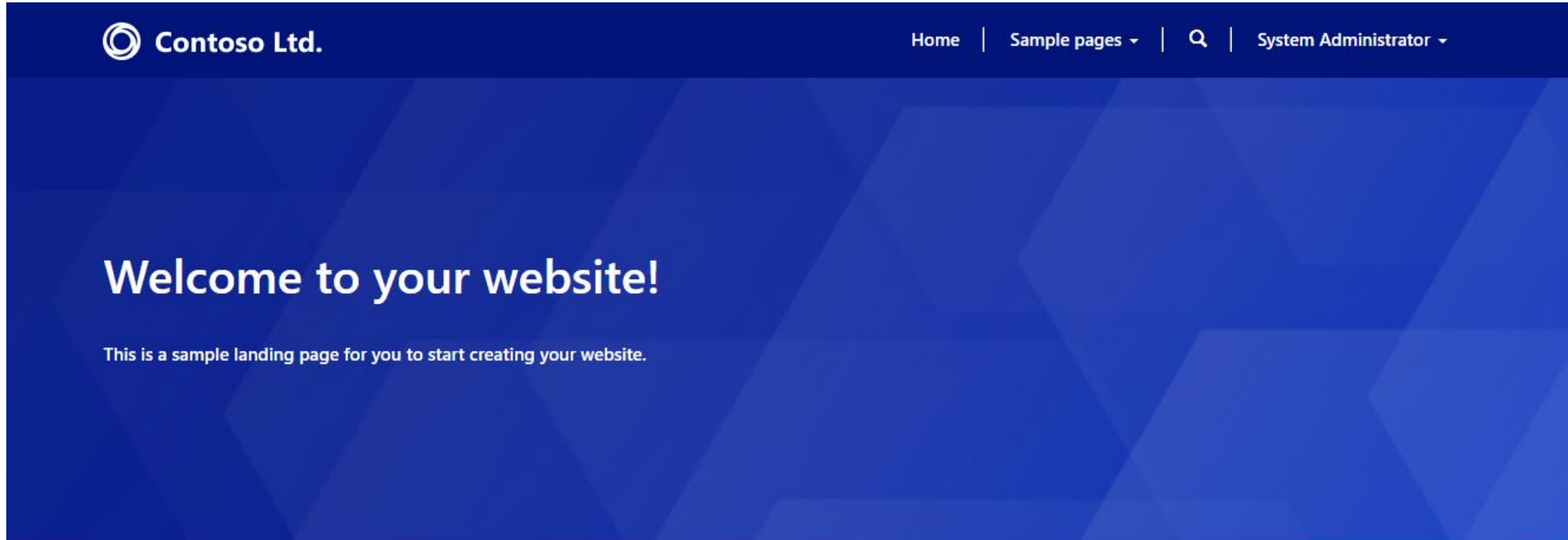
Model-driven

Model-driven

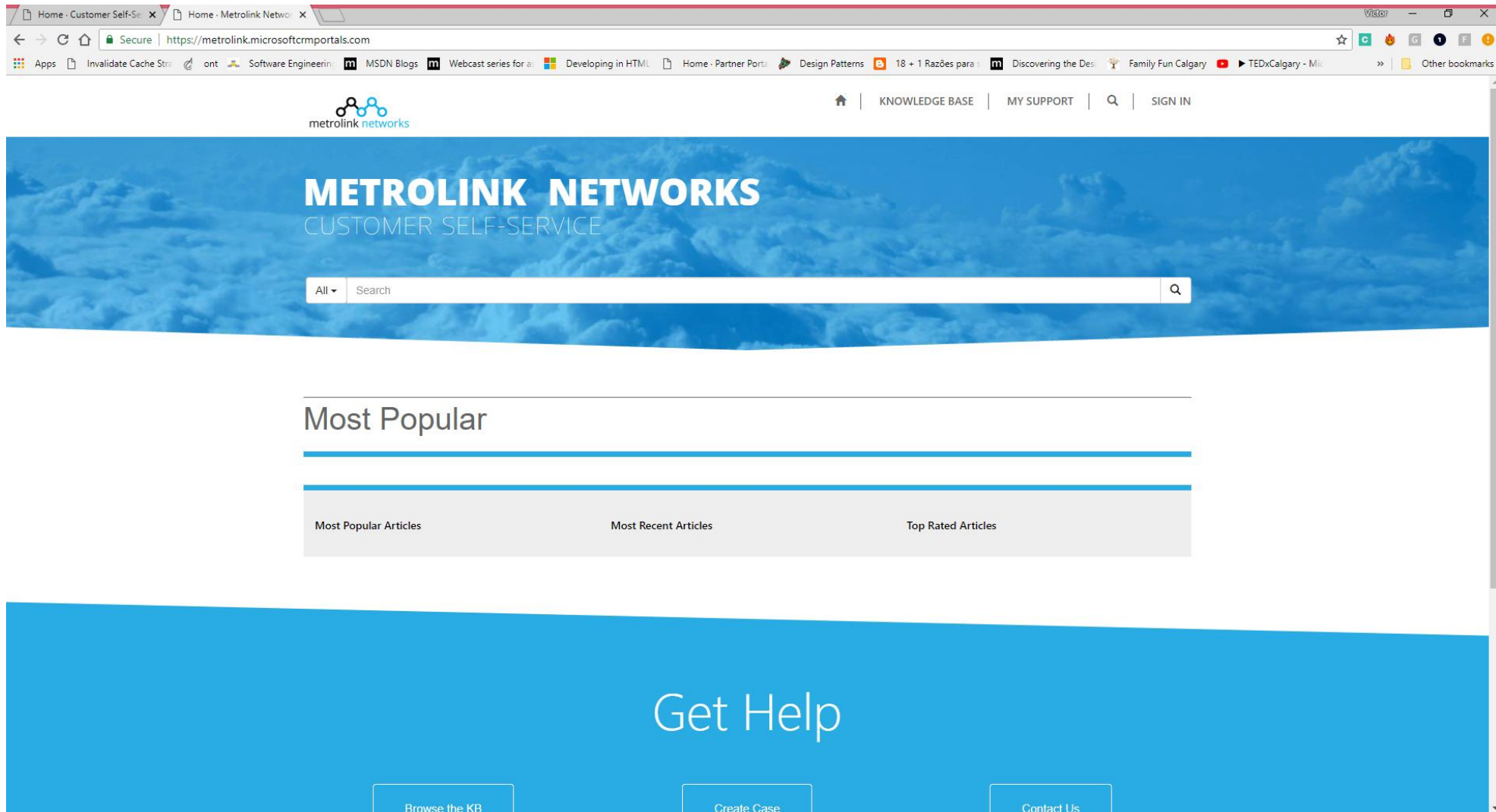
Portal

All apps →

First Glance - CMS and Multi-Language Support

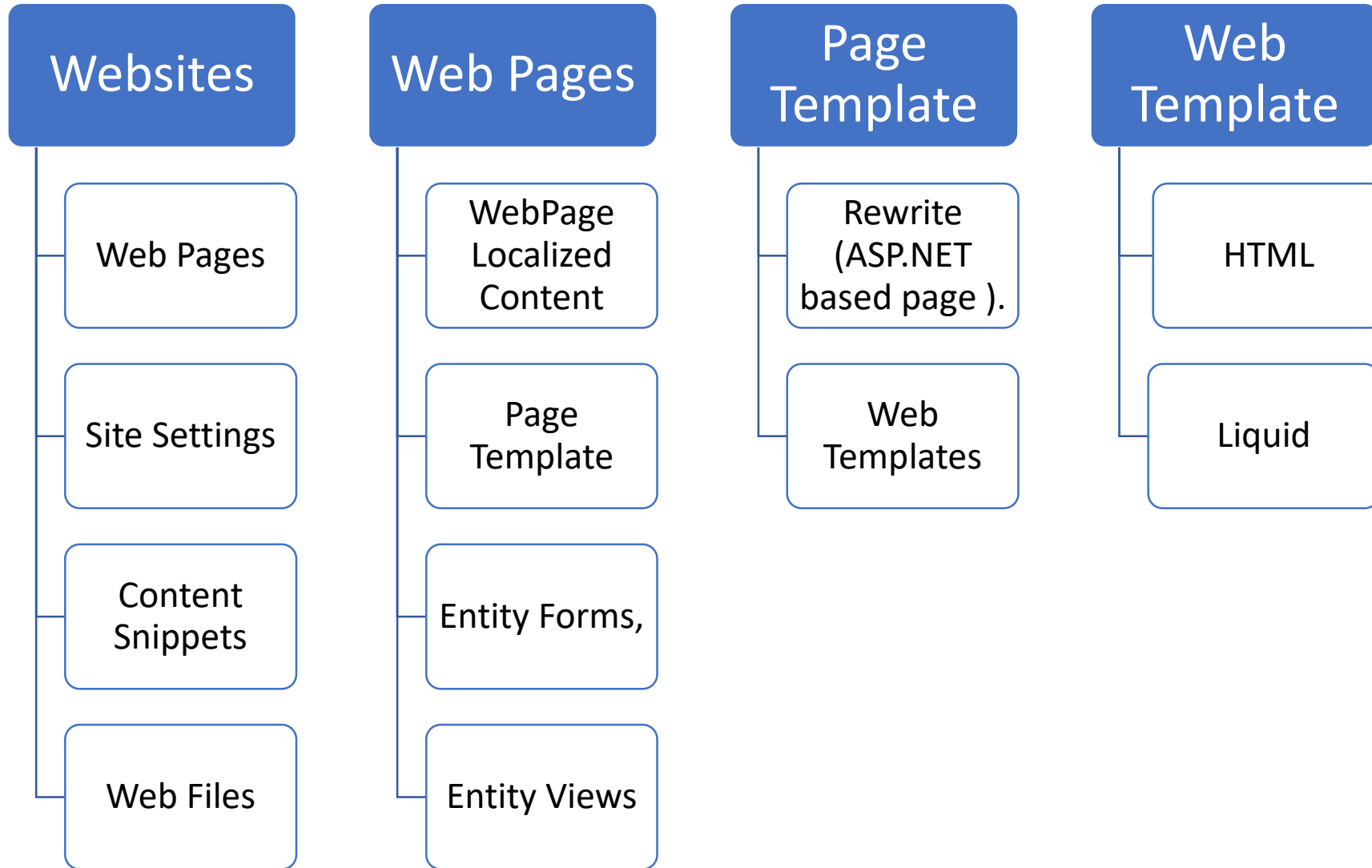


Portal Branding



Portal Components

What is going on behind the scenes?



Site Settings, Site Markers and Content Snippets

The screenshot displays the Dynamics 365 user interface. The top navigation bar shows the 'Dynamics 365' logo and the 'Portals > Site Settings' breadcrumb. The left sidebar contains a navigation menu with categories like 'Website', 'Content', and 'Portals'. The 'Site Settings' option is selected. The main content area is titled 'Active Site Settings' and features a table of configuration items. The table has three columns: 'Name', 'Value', and 'Website'. The 'Website' column for all entries is 'Customer Self-Service'. The table lists various authentication settings, including login throttling, tracking, and OpenAuth configurations for Facebook, LinkedIn, Microsoft, and Twitter. At the bottom of the table, there is a pagination bar showing '1 - 50 of 55 (0 selected)' and a 'Page 1' indicator.

Name	Value	Website
Authentication/LoginThrottling/IpAddressTimeoutTimeSpan	00:10:00	Customer Self-Service
Authentication/LoginThrottling/MaxAttemptsTimeLimitTimeSpan	00:03:00	Customer Self-Service
Authentication/LoginThrottling/MaxInvalidAttemptsFromIpAddress	1000	Customer Self-Service
Authentication/LoginTrackingEnabled	False	Customer Self-Service
Authentication/OpenAuth/Facebook/AppId	---	Customer Self-Service
Authentication/OpenAuth/Facebook/AppSecret	---	Customer Self-Service
Authentication/OpenAuth/LinkedIn/ConsumerKey	---	Customer Self-Service
Authentication/OpenAuth/LinkedIn/ConsumerSecret	---	Customer Self-Service
Authentication/OpenAuth/Microsoft/ClientId	---	Customer Self-Service
Authentication/OpenAuth/Microsoft/ClientSecret	---	Customer Self-Service
Authentication/OpenAuth/Twitter/ConsumerKey	---	Customer Self-Service
Authentication/OpenAuth/Twitter/ConsumerSecret	---	Customer Self-Service

Entity Forms, Entity Views, Entity Permissions and Web Forms

Open a New Case · Cust... X

localhost:52281/support/create-case/

Apps Invalidate Cache Str... ont Software Engineerin... MSDN Blogs Webcast series for a... Developing in HTML... Home · Partner Port... Design Patterns 18 + 1 Razões para ... Discovering the Des... Family Fun Calgary TEDxCalgary - Mic... Other bookmarks

Contoso, Ltd.

Home > Support > Open a New Case

Open a New Case

Children
Edit
Delete
New ▾

Title *

Customer *
System Administrator x 🔍

Case Type
▼

Contact
Subject
▼

Description

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

```
1 <section id="gethelp" class="page_section section-diagonal-right color-inverse {% substitution %}{% if page %}{% unless page.parent %}home-section{% endunless %}{% endif %}{% endsubsti
2 tution %} hidden-print">
3   <div class="container">
4     <div class="row">
5     </div>
6   </div>
7 </section>
8 <footer role="contentinfo">
9   <div class="footer-top hidden-print">
10    <div class="container">
11      <div class="row">
12        <div class="col-md-6 col-sm-12 col-xs-12 text-left">
13          {% editable snippets 'About Footer' type: 'html' %}
14        </div>
15        <div class="col-md-6 col-sm-12 col-xs-12 text-right">
16          <ul class="list-social-links">
17            <li><a href="#"><span class="sprite sprite-facebook_icon"></span></a></li>
18            <li><a href="#"><span class="sprite sprite-twitter_icon"></span></a></li>
19            <li><a href="#"><span class="sprite sprite-email_icon"></span></a></li>
20          </ul>
21        </div>
22      </div>
23    </div>
24  </div>
25
26  <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

ATB | boostR

START BOOST LEARN CONNECT EVENTS BLOG

Search

Sign In

ATB Financial

ATB Financial

ATB Financial

ATB Financial

ATB Financial

ATB BoostR Mastercard

Successfully raise \$10,000 through BoostR & receive a \$10,000 ATB Business Mastercard

*Restrictions Apply

Connect to an advisor to today!

ATB Listens

Validation & Funding

Exposure

Expert advice

Created by ATB

LONG

Long live your building!

Portal Feedback?

LONG Office

Denver Metro: 303-975-2149

Colorado Springs: 719-264-4516

After Hours: 303-650-7199

Request

Knowledge Base

Service Tickets

Service Contracts

Help

My Connected

metrolink networks

KNOWLEDGE BASE | MY SUPPORT | SIGN IN

METROLINK NETWORKS

CUSTOMER SELF-SERVICE

All Search

Most Popular

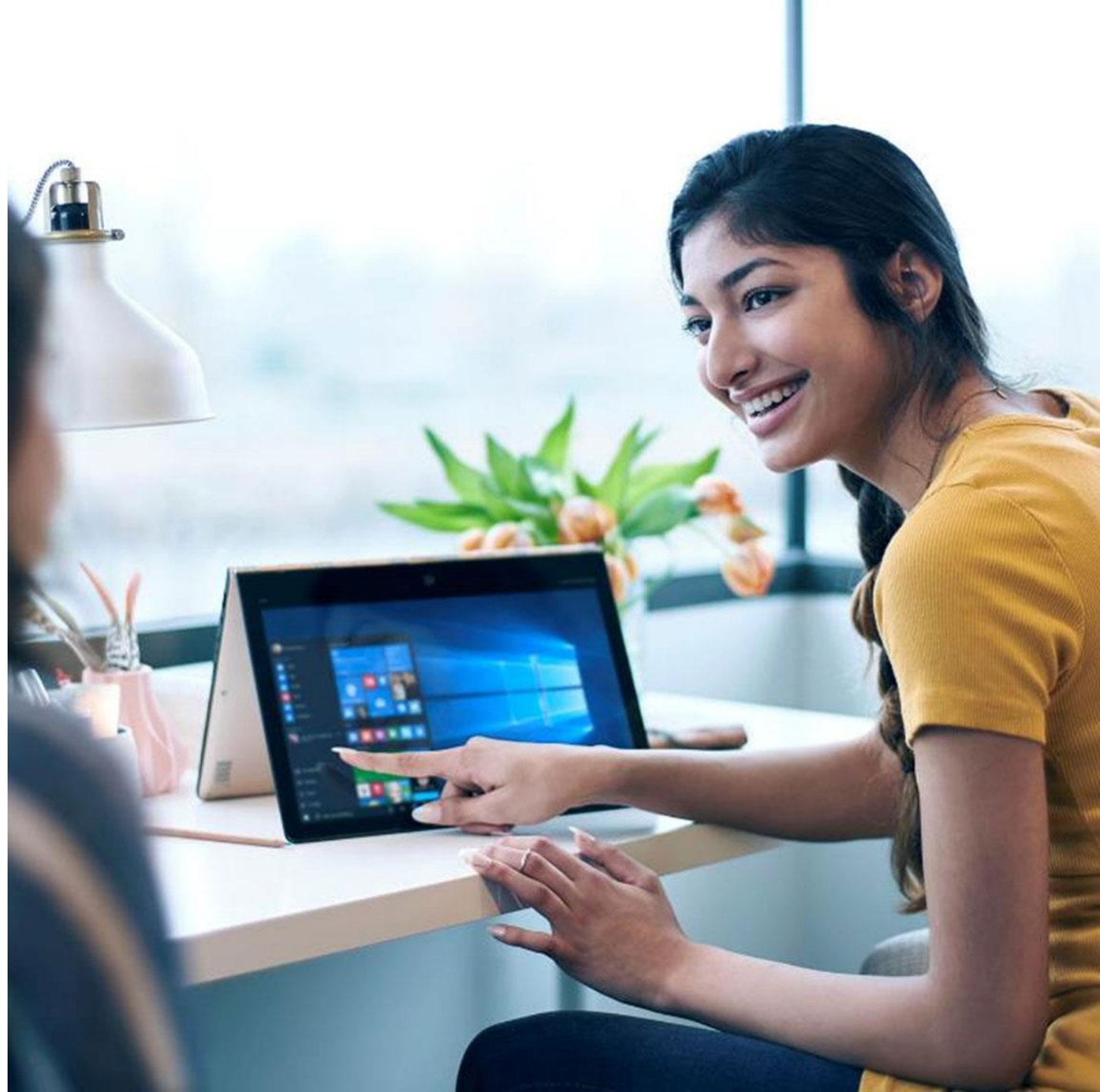
Most Popular Articles

Most Recent Articles

Top Rated Articles

Dynamics 365 Portals DevOps

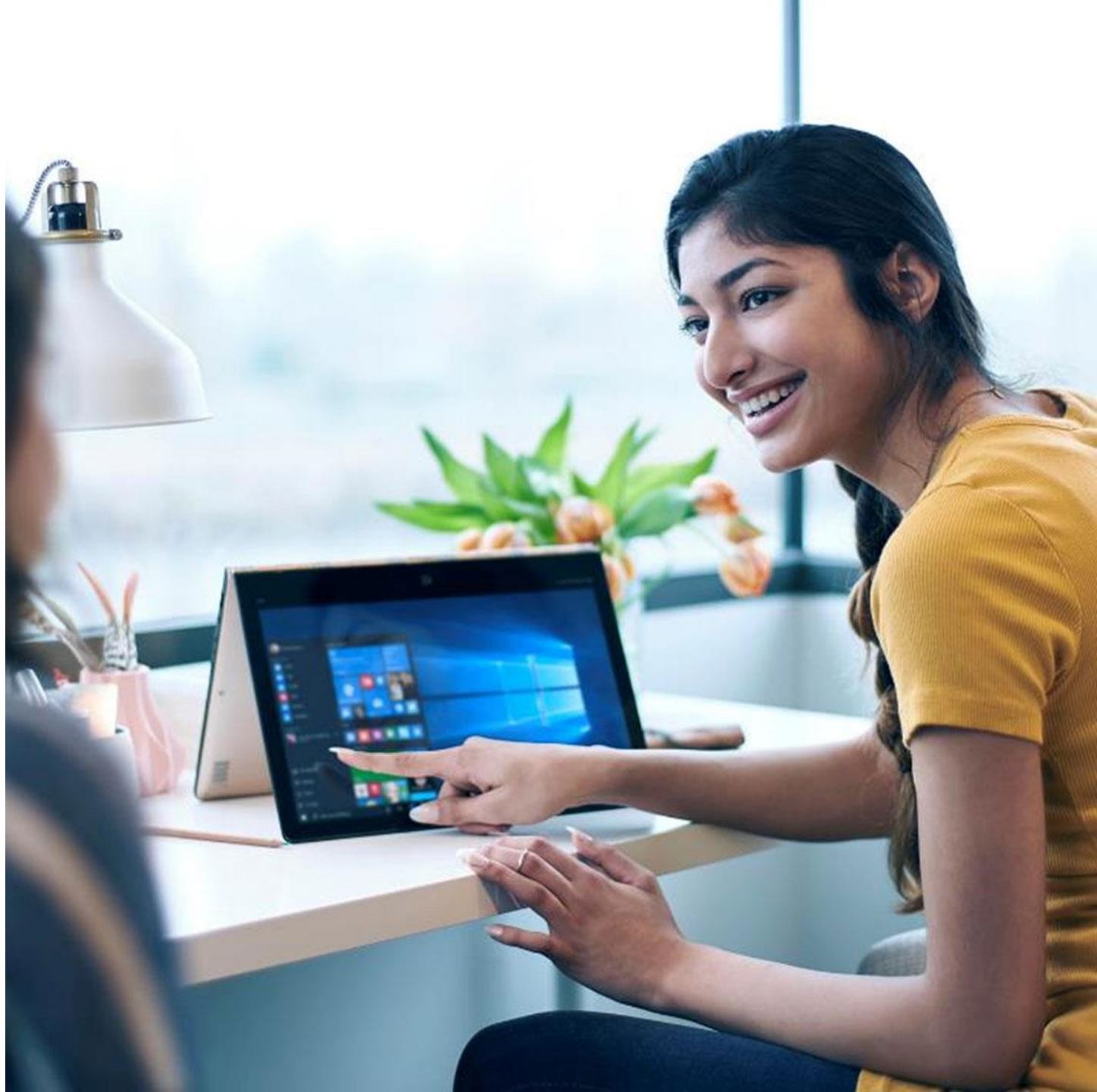
- TFS/Git for Source control
- Custom Kingsway soft SSIS packages to move/copy Portal config data;
- James Novak – PortalRecordsMover tool
- Console:
<https://github.com/jamesnovak/PortalRecordsMoverConsole>
- XrmToolBox:
<https://www.xrmtoolbox.com/plugins/MscrmTools.PortalRecordsMover/>



PowerApps Portals

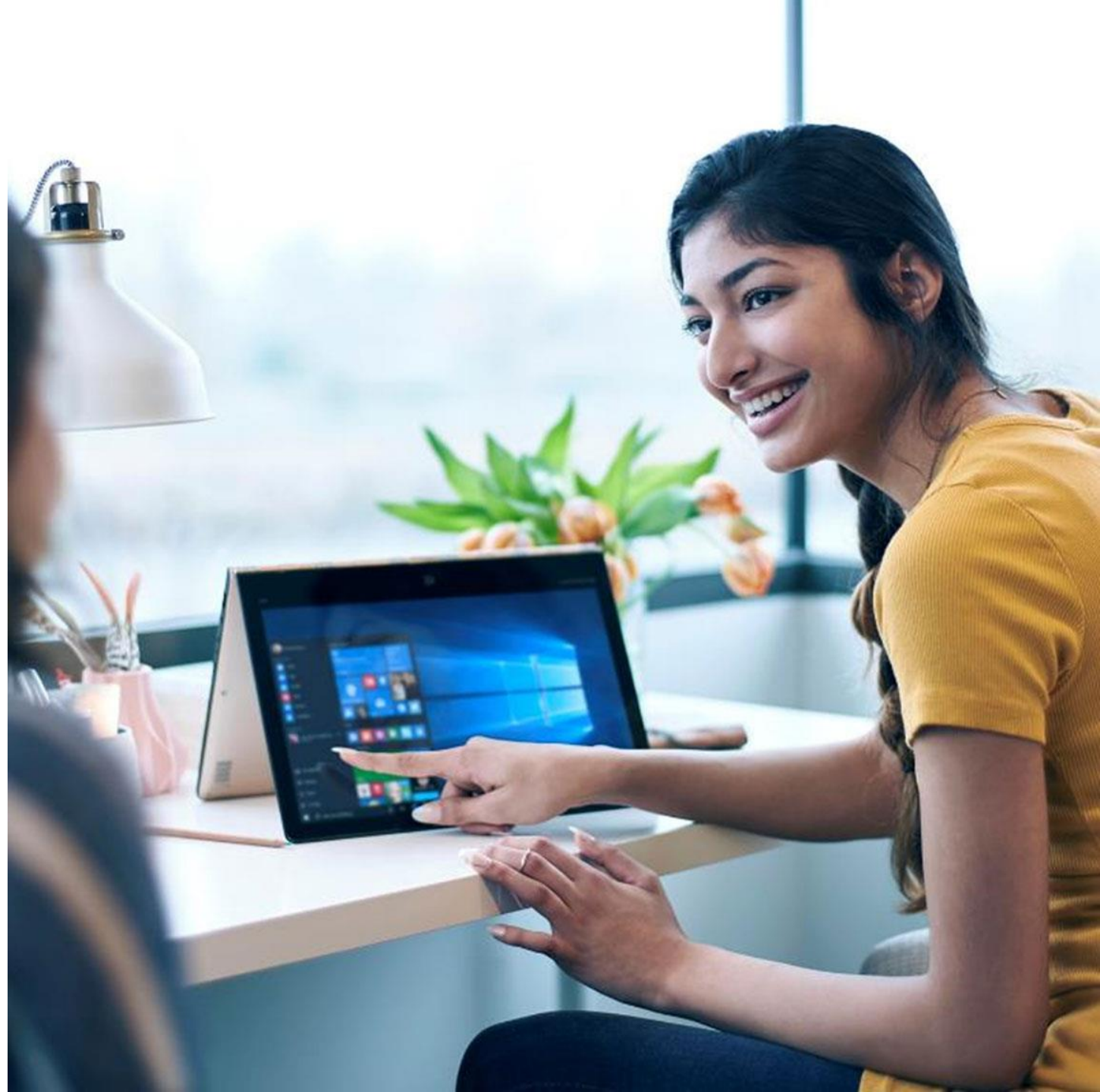
Other open-source projects

- 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

Victor Dantas
Power Platform Consultant
365 Saturday Ambassador



The Power of Community

“As iron sharpens iron, so a friend sharpens another”

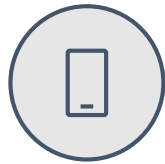


Thanks!



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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

- Earn badges for participation and engagement
- 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**

Social

- www.365portal.org
- Twitter: @Dyn365Community
- LinkedIn: @365-Saturday
- Hashtags
 - #D365SaturdayVictoria #365Saturday #msdyn365
- Wifi: TBC
- Pass: TBC
- Community.Dynamics365.com

Feedback

- **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.**

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 of

ADD TO SCHEDULE/CHECK IN

Add to my event schedule

[View your event schedule](#)

WHEN

17 August 2019

1 day, 18 hours and 49 minutes

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

[View your event schedule](#)

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!

ADD TO SCHEDULE/CHECK IN

Undo check in

[View your event schedule](#)

WHAT TIME

14:00 - 14:50

EVENT

[365 Saturday Amsterdam 2019](#)

SPEAKER



Neil Parkhurst

Feedback

Your feedback is very important to us, so please complete this form to tell us your thoughts. If you would prefer that your feedback remains anonymous, check the option below.

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 [caliente](#)

☐ Submit anonymous feedback

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	