



NOVEMBER 2019



365  
Saturday

FREE TICKETS,  
LIMITED CAPACITY

# DYNAMICS POWER! TEL AVIV 365

TEL AVIV'S FREE ANNUAL  
BUSINESS APPLICATIONS  
TECHNICAL CONFERENCE BY  
365 SATURDAY



NORTH52 dox42

Turbocharge Dynamics 365

Automate your documents  
Integrate your data



ClickDimensions

CognitiveGroup  
Microsoft Talent Solutions





NOVEMBER 2019

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# DYNAMICS POWER! TEL AVIV 365

TEL AVIV'S FREE ANNUAL  
BUSINESS APPLICATIONS  
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The BIZ AID logo, featuring the word "BIZ" in grey and "AID" in blue, with a stylized blue triangle above the "A". Below it, the text "TOP MANAGEMENT SOLUTIONS" is written in a smaller, grey, sans-serif font.

**BIZ AID**  
TOP MANAGEMENT SOLUTIONS

**GOLD SPONSOR**

# POWERAPPS PORTALS – DEEP DIVE

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>
- Community Plan
  - <https://powerapps.microsoft.com/en-us/communityplan/>



# CDS ENVIRONMENT & DATABASE

Admin center

Environments

General Data Protection Regulation (GDPR) is now in effect. [Learn more](#)

NAME ^

Accelerators (org2b6c448f)

eyedeasinc.com (default)

eyedeasinc.com (from preview)

New environment

Create new environments for app and flow development and to maintain separate databases. [Learn more](#)

Environment name

Region ?

Canada (default)

Can't be changed once your environment is created.

Environment type ?

Trial

Cancel

Create environment

?

New environment

CREATED BY

CREATED

Victor Dantas

09/04/2019

SYSTEM

01/30/2019

SYSTEM

01/30/2019

PowerApps

Admin center

Environments

Data policies

Data integration

Tenant

← eyedeasinc.com (default)

Delete

Details

Security

Resources

Name

eyedeasinc.com (default)

Created by

SYSTEM

Created

1/30/2019 7:15:47 PM

Region

Canada

Add a database

Collect, store, and share your data. Create a database for this environment. [Learn more about databases.](#)


Create my database

Save


Cancel




# 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.](#)

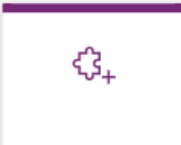
## Build business apps, fast


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


### Make your own app




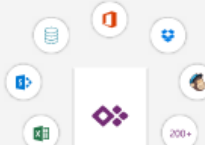
**Canvas app from blank**  
 Canvas app




**Model-driven app from blank**  
 Model-driven app



**Portal from blank**  
 Portal



**Start from data**  
 Canvas app

[All templates](#) →





# FIRST GLANCE - CMS AND MULTI-LANGUAGE SUPPORT

## Welcome to your website!

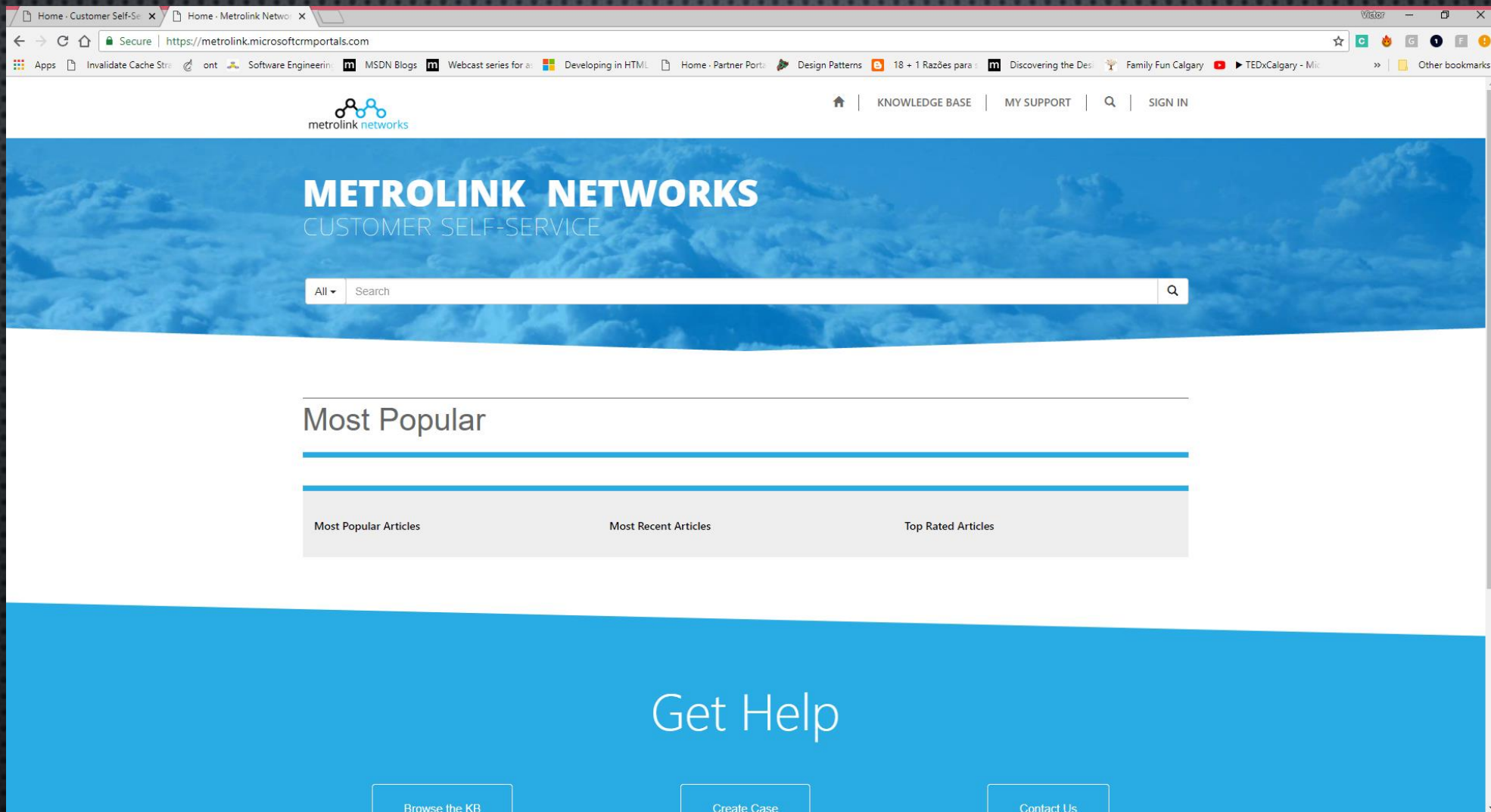
This is a sample landing page for you to start creating your website.

# PORTAL BRANDING

Demo

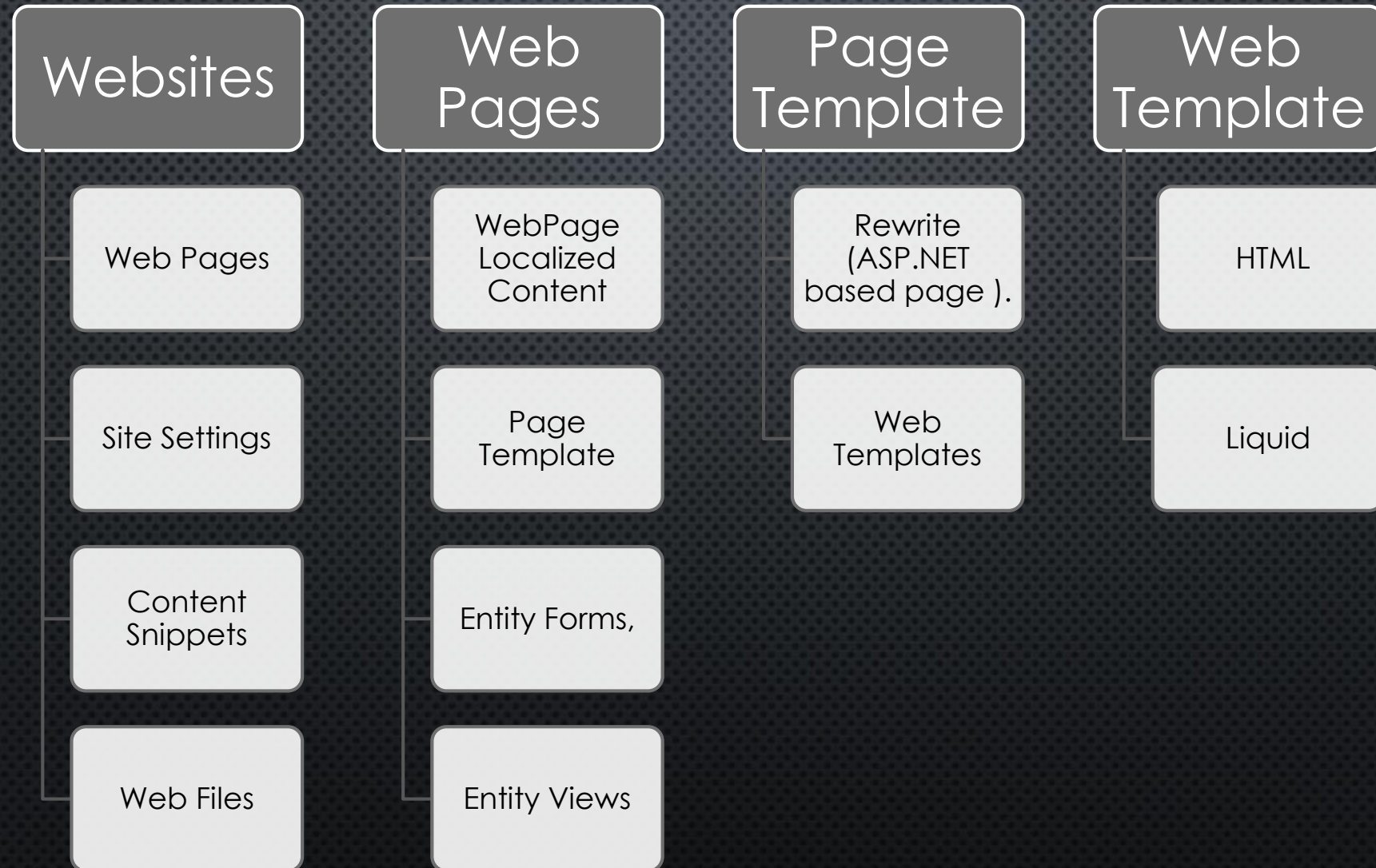


# PORTAL BRANDING



# PORTAL COMPONENTS

WHAT IS GOING ON BEHIND THE SCENES?





# SITE SETTINGS, SITE MARKERS AND CONTENT SNIPPETS

Microsoft Office Home

Microsoft 365 admin center - All

Dynamics 365

Portals 9.1.5.27

Site Settings Active Site Settings

Case: Case: Dysfunctional Litwa

https://dyn365nyc.crm.dynamics.com/main.aspx?appid=4d7baa03-1683-e911-a83a-000d3a1ee259&pagetype=entitylist&etn=adx\_sitestetting

Incognito (3)

Dynamics 365

Dynamics 365 Portals

Portals > Site Settings

Show Chart

New

Delete

Refresh

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

Import from Excel

Create view

Active Site Settings

Search for records

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

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 50 of 55 (0 selected)

Page 1

Website

Content

Portals

# ENTITY FORMS, ENTITY LIST, ENTITY PERMISSIONS AND WEB FORMS

Open a New Case - Cust...

localhost:52281/support/create-case/

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

Contoso, Ltd.

Home > Support > Open a New Case

Open a New Case

Title \*

Customer \* System Administrator

Case Type

Subject

Description

Children Edit Delete New

# ENTITY FORMS, ENTITY VIEWS, ENTITY PERMISSIONS AND WEB FORMS

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



# ENTITY FORMS

Demo



# ENTITY LIST

Demo

# ENTITY METADATA

Demo

# 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

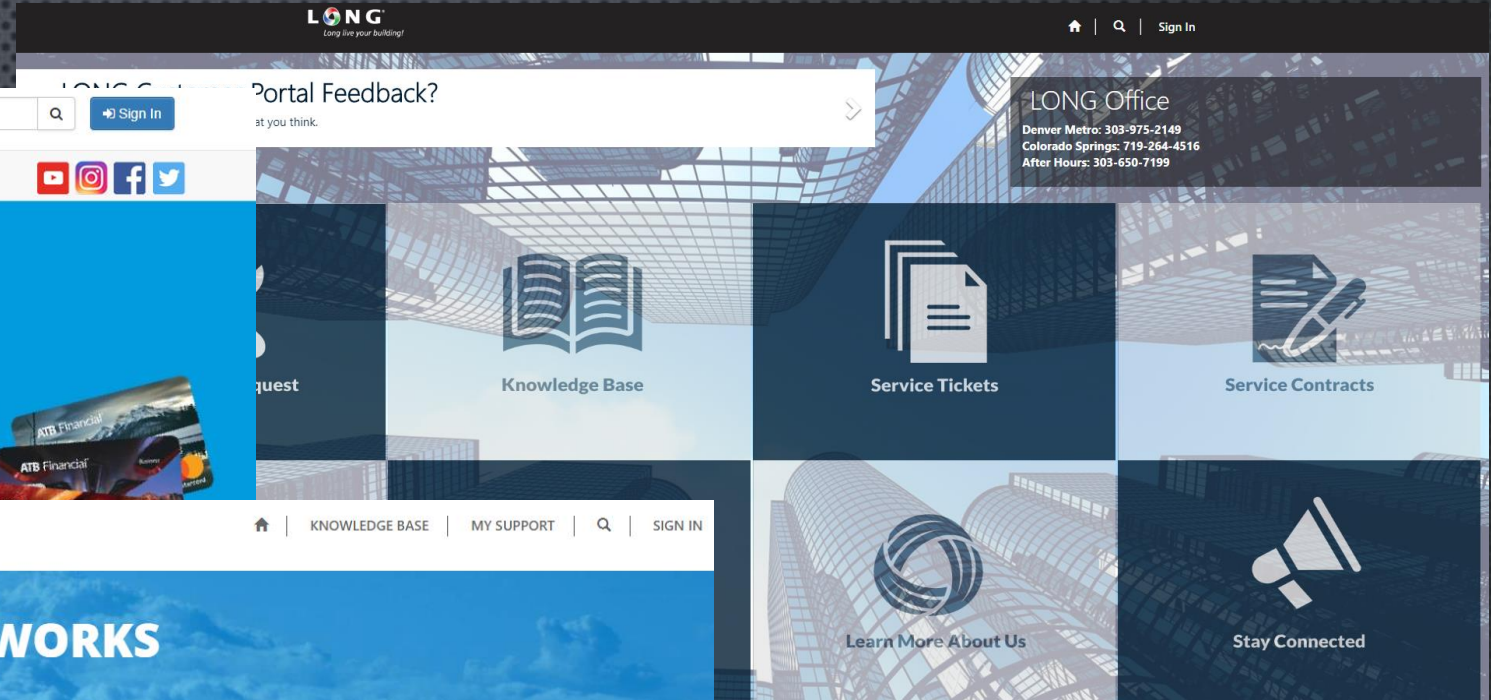
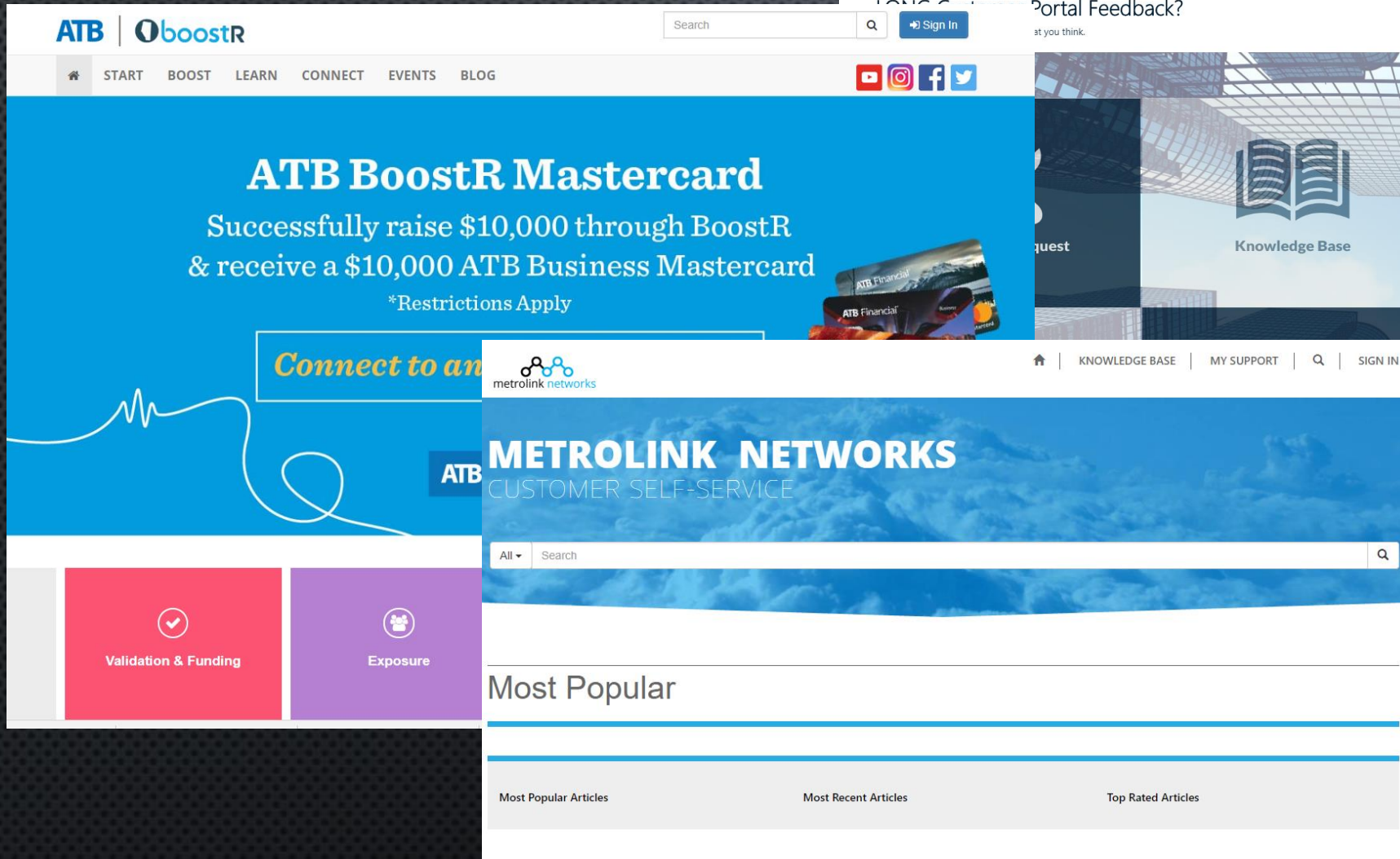
- Template programming language created by Shopify;
  - <https://help.shopify.com/en/themes/liquid>
- Liquid .NET
  - <https://github.com/mikebridge/Liquid.NET>
- PowerApps Portals Liquid Objects
  - <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/portals/liquid-objects>
- Main objects
  - 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: Allows 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





# POWERAPPS 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>
- XrmPortalJS
  - <https://github.com/dynamicscode/XrmPortalJS>
- PowerApps Portals Accelerators
- PowerApps Portals AzureDevOps CI/CD task – Eugene van Staden





# POWERAPPS 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!

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dantas.ca



Email: [victor@dynamics.community](mailto:victor@dynamics.community)

# WHAT'S NEXT?

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dantas.ca  
365portal.org

- Webinars:
  - No Xrm Coder left behind Webinar – Dec 5<sup>th</sup> 2019
  - Portals - Mastering Webtemplates Webinar – Jan 8<sup>th</sup>, 2020
- Conferences:
  - Dynamics Power Conference Tel Aviv, Israel – Nov 21<sup>st</sup>, 2019
  - Dynamics Power Conference Paris, France – Nov 22<sup>nd</sup>, 2019
  - Dynamics Power Conference Dubai, UAE – Feb 29<sup>th</sup>, 2020
  - 365 Saturday NYC, NY – March 13<sup>th</sup>, 2020 – **TBC\***
  - 365 Saturday Seattle, MVP Summit Special – March 21<sup>st</sup>, 2020
  - 365 Saturday Los Angeles – April 18<sup>th</sup>, 2020 – **TBC\***
  - 365 Saturday Calgary – May 2<sup>nd</sup>, 2020
  - 365 Saturday Caribbean Edition – Florida / Puerto Rico – May 16<sup>th</sup>, 2020
  - 365 Saturday Quebec City – June 20<sup>th</sup>, 2020