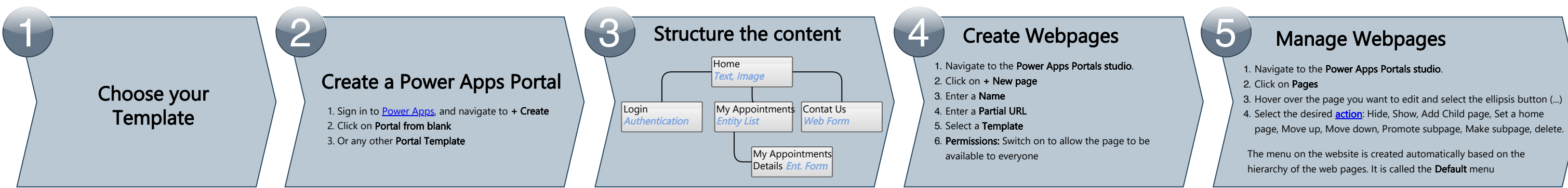


Power Apps Portals - Concepts & Cheatsheet



Templates

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.

Customer self-service portal

The customer self-service portal enables customers to access self-service features like:

- Content Management
- Knowledge Management
- Support/Case Management
- Forums
- Faceted Search
- Profile Management
- Subscribe to Forum Thread
- Comments

Employee self-service portal

An employee self-service portal creates an efficient and well-informed workforce by streamlining common tasks and empowering every employee with a definitive source of knowledge

- Content Management
- Knowledge Management
- Support/Case Management
- Forums
- Faceted Search
- Profile Management
- Subscribe to Forum Thread
- Comments

Community portal

A community portal leverages peer-to-peer interactions between customers and experts to organically grow the catalog of available knowledge.

- Content Management
- Knowledge Management
- Support/Case Management
- Forums
- Comments
- Ideas
- Blogs

Partner portal

A partner portal allows every organization with resellers, distributors, suppliers, or partners to have real-time access to every stage of shared activities.

- Knowledge Management
- Project Service Automation Integration
- Field Service Integration
- Partner Onboarding

Customer Portal (D365 Supply Chain)

Provides portal access to Dynamics 365 Supply Chain Management data by using dual-write Dataverse entities.

- Invite Customers
- Order history
- Create orders
- View Account info

Update Header and Footer

1. Navigate to the [Power Apps Portals studio](#).

2. Click on [Pages](#)

3. Select the [Home](#) page

4. Update the Header and Footer text

Update background image

1. Navigate to the [Portal Management App](#).

2. Click on [Web Files](#)

3. Open the [homehero.jpg](#)

4. Click on [Notes](#)

5. [Add a new image](#).

Webpage

Portals Concepts

WELCOME! TO PORTALS CONCEPTS

Static Content

Lists

Forms

Add a LIST

Prepare your Table View in Dataverse first

1. Navigate to [Power Apps](#)

2. Create a specific [Table View](#) to be used on your portal

Create your LIST for the Portal

1. Navigate to [Power Apps Portals studio](#)

2. Select and [existing page](#) or [create a new one](#).

3. Add the [List](#) component:

1. Select [Create new](#)

2. Enter a [Name](#)

3. Select an [Entity](#)

4. Select [Views](#) (Here, select the view you created in Dataverse)

5. Switch on to [Create new record](#). [View details](#), [Edit record](#) and [Delete record](#)

6. [Settings](#): Set the number of records per page, enable search in entity list, enable entity permission

Update the NAVIGATION

Method #1: The menu on the website is created automatically based on the hierarchy of the web pages. It is called the [Default menu](#)

1. Navigate to the [Power Apps Portals studio](#).

2. Select the [header](#) component

3. Select [Default](#) in the [Navigation Menu](#)

4. Your navigation will reflect the defined hierarchy

Method #2: Use a custom menu navigation

1. Navigate to the [Power Apps Portals studio](#).

2. Select the [header](#) component

3. Select [Primary navigation](#) in the [Navigation Menu](#)

4. Navigate to the [Portal](#).

5. [Sign in](#) with your Admin account

6. [Hover](#) on the navigation and click on [Edit](#)

7. [Add](#), [Edit](#) or [remove](#) a [Web Link](#).

Add STATIC CONTENT

1. Navigate to [Power Apps Portals studio](#)

2. Select and [existing page](#) or [create a new one](#).

3. Add the following [Components](#):

- One, Two or Tree columns section
- Text, Image, IFrame, Form, List, Breadcrumb, Power BI

Add a FORM

1. Navigate to [Power Apps](#)

2. Create a specific [Table Form](#) to be used on your portal

3. Navigate to [Power Apps Portals studio](#)

4. Select and [existing page](#) or [create a new one](#).

5. Add the [Form](#) component:

1. Select [Create new](#)

2. Enter a [Name](#)

3. Select an [Entity](#)

4. Select [Form layout](#) (Here, select the Form you created under step 2)

5. Select the [Mode](#): Insert, Edit, Readonly

6. [Form success settings](#): Show success message, Redirect to webpage, Redirect to URL

7. [Advanced settings](#): Show captcha, Enable Entity permissions

User Management & Security

Contact Invitation

Password Reset

Profile Management

Customize

Upload your custom CSS

1. Navigate to the [Power Apps Portals studio](#).

2. Click on [Themes](#)

3. Click on [Upload custom CSS](#)

Create or work with Themes

1. Navigate to the [Power Apps Portals studio](#).

2. Click on [Themes](#)

3. Switch on [Enable basic theme](#)

4. Click on [New Theme](#)

Upload a bootstrap v3 Theme

1. Navigate to <https://bootswatch.com/3/>

2. Choose a [Theme](#)

3. Download [bootstrap.min.css](#)

4. Rename the file to [yourname].min.css

5. Navigate to the [Power Apps Portals studio](#).

6. Click on [Themes](#)

7. Click on [Upload custom CSS](#)

<portal_path>/_services/about

Use different Web Templates

1. Navigate to the [Power Apps Portals studio](#).

2. Click on [Pages](#) and load an existing page

3. Experiment with the existing [templates](#) to meet your needs.

Advanced CSS

Liquid templates

User Management & Security

Create Entity Permissions

(Apply record-based security to records)

1. Navigate to the [Portal Management App](#)

2. Click on [Entity Permissions](#)

3. Click on [New](#) to create Entity Permission records for each Entity List and Entity Form you are using on your Portal.

4. Select [Scope](#): Global, Contact, Account, Parent, Self

5. Select [Privileges](#): Read, Create, Append, Write, Delete, Append To

6. [Optional] Add [Child Entity Permissions](#)

7. Select [Web Roles](#)

Page Permissions

(Control access to the webpages)

1. Navigate to the [Power Apps Portals studio](#).

2. Open a [Page](#)

3. [Permissions](#): Switch on to allow the page to be available to everyone

Web Roles

Website access permissions

Document Storage

Notes

Azure storage

SharePoint documents

Advanced configuration

Site Settings

Search

Multi language

Web files

Content snippets

Redirect URL

Add a chart

Web forms

Tools & Settings

Admin Center

Power Apps Portals admin center

The Power Apps Portals admin center allows you perform advanced administrative actions on portals. Some of the actions you can do are:

- Change the Name & URL, Type (Trial, Production)
- Switch the Portal state (On or Off)
- Add a custom domain
- Enable integration with SharePoint or Power BI integration

Authentication settings

Identity providers

The Portals authentication settings let you:

- Switch External login (On or Off)
- Switch Open registration (On or Off)
- Switch the Require unique email (On or Off)
- Configure Identity providers: Local, Azure AD, Azure AD B2C, Facebook, LinkedIn, Google, Twitter, Microsoft

Portal Management App

Dynamics 365 Portal Management

The Portal Management app lets you do advanced configuration actions on your portal. The app is available after the database on Microsoft Dataverse is created successfully.

Power Apps Portals studio

Power Apps | Portal

You can use Power Apps portals Studio to create and customize your website. It contains various options to add and configure webpages, components, forms, and lists. The anatomy of Power Apps portals Studio is as follows:

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