

365

Saturday

Nick Doelman

Crash Course in Power
Platform Portals

Introduction to Dynamics 365 Portals

Introduction

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International

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eXalents

365

Saturday

January, 26th 2019

Boston, MA

Introduction to Dynamics 365 Portals

Goal Today

In the next 45 minutes...

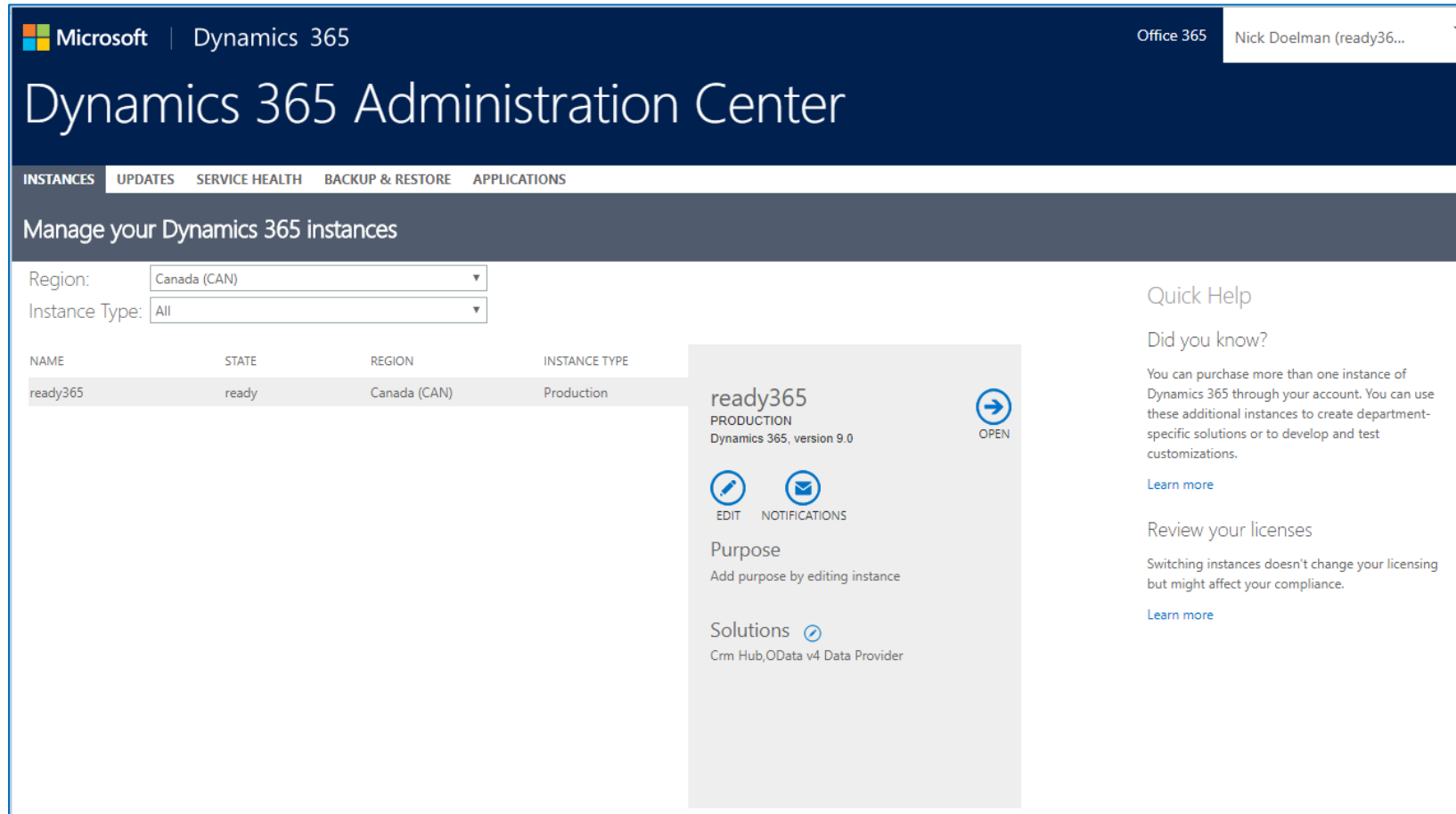
- Provision a portal and surface Dynamics 365 data to an authenticated external user
- LIVE demonstration
- Assume knowledge of Dynamics 365 Configuration (Entities, Forms, Views, etc)

Introduction to Dynamics 365 Portals

Step 1 - Provision Portal



Introduction to Dynamics 365 Portals



The screenshot displays the Dynamics 365 Administration Center interface. At the top, the Microsoft logo and 'Dynamics 365' are on the left, and 'Office 365' and the user 'Nick Doelman (ready36...)' are on the right. The main heading is 'Dynamics 365 Administration Center'. Below this is a navigation bar with tabs: INSTANCES, UPDATES, SERVICE HEALTH, BACKUP & RESTORE, and APPLICATIONS. The 'INSTANCES' tab is selected, and the sub-header is 'Manage your Dynamics 365 instances'. There are two dropdown filters: 'Region:' set to 'Canada (CAN)' and 'Instance Type:' set to 'All'. A table lists the instances, with one instance 'ready365' in the 'Production' state, located in 'Canada (CAN)'. To the right of the table, a detailed view for the 'ready365' instance is shown, including its name, state, region, and type. It also features buttons for 'EDIT' and 'NOTIFICATIONS', a 'Purpose' section with a link to 'Add purpose by editing instance', and a 'Solutions' section listing 'Crm Hub, OData v4 Data Provider'. On the far right, a 'Quick Help' section titled 'Did you know?' provides information about purchasing multiple instances and includes links to 'Learn more' and 'Review your licenses'.

Microsoft | Dynamics 365 Office 365 Nick Doelman (ready36...)

Dynamics 365 Administration Center

INSTANCES UPDATES SERVICE HEALTH BACKUP & RESTORE APPLICATIONS

Manage your Dynamics 365 instances

Region: Canada (CAN) Instance Type: All

NAME	STATE	REGION	INSTANCE TYPE
ready365	ready	Canada (CAN)	Production

ready365
PRODUCTION
Dynamics 365, version 9.0

EDIT NOTIFICATIONS

Purpose
Add purpose by editing instance

Solutions
Crm Hub, OData v4 Data Provider

Quick Help
Did you know?
You can purchase more than one instance of Dynamics 365 through your account. You can use these additional instances to create department-specific solutions or to develop and test customizations.
[Learn more](#)
Review your licenses
Switching instances doesn't change your licensing but might affect your compliance.
[Learn more](#)

Introduction to Dynamics 365 Portals

The screenshot displays the Dynamics 365 Administration Center interface. At the top, the Microsoft logo and 'Dynamics 365' are visible on the left, and 'Office 365' and the user 'Nick Doelman (ready36...)' are on the right. The main heading is 'Dynamics 365 Administration Center'. Below this is a navigation bar with tabs: INSTANCES, UPDATES, SERVICE HEALTH, BACKUP & RESTORE, and APPLICATIONS. The 'APPLICATIONS' tab is selected, leading to the 'Manage applications' section. A table lists various applications and their status:

APPLICATION	STATUS
Dynamics 365 Connector for LinkedIn Lead ...	NotConfigured
Dynamics 365 Customer Service Application	Enabled
Dynamics 365 Customer Service Hub	Enabled
Dynamics 365 for Field Service	Enabled
Dynamics 365 for Project Service Automation	Enabled
Dynamics 365 for Sales, Enterprise Edition ...	Enabled
Dynamics 365 Marketing Application	NotConfigured
Dynamics 365 Relationship Insights	NotConfigured
Live Assist for Dynamics 365 Powered by Ca...	NotConfigured
Microsoft Dynamics 365 - Gamification	Enabled
Microsoft Dynamics 365 CRM Hub	Enabled
Portal Add-On	NotConfigured
Voice of the Customer	NotConfigured

The 'Portal Add-On' row is highlighted in green. To the right of the table, a 'Portal Add-On' sidebar is visible, featuring a 'MANAGE' button and a description: 'Portal is an Add-On subscription for CRM Online that allows you to extend the engagement with Customer and Employee audiences into an Azure-hosted web portal. This Add-On requires a pre-existing CRM Online subscription and may only be associated with one instance per Portal. Each portal includes 1,000,000 page views per month.'

At the bottom of the page, the footer contains the Microsoft logo, copyright information '© 2017 Microsoft Corporation', links for 'Legal' and 'Privacy Statement', and a 'Community' link.

Introduction to Dynamics 365 Portals

Microsoft Dynamics 365

Portal Details


Configure Your Portal

General Settings

*Name

*Type

Select Portal URL

*Portal URL
 .microsoftcrmportals.com 

You can update it to a vanity domain name once the portal is provisioned.

Select a Dynamics 365 instance

*Dynamics 365 Instance

*Select Portal Language

*Select Portal Administrator

*Portal Audience

☐ Partner

☒ Customer

☐ Employee

*Select Portal to be deployed

☐ Dynamics 365 Portals - Community Portal

☒ Dynamics 365 Portals - Custom Portal

☐ Dynamics 365 Portals - Customer Self-Service Portal

☐ Enable portal for early upgrade

By clicking Submit, you agree to our [terms and conditions](#).

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Introduction to Dynamics 365 Portals

Terms of Service

PLEASE NOTE: Microsoft Corporation (or based on where you reside, one of its affiliates) licenses this supplement to you. You may use it with each validly licensed subscription of Microsoft Dynamics 365 Online service (the "Online Service"). You may not use this supplement if you do not have a license for the Online Service. Microsoft provides support services for this supplement as described in the Service Level Agreement for Microsoft Online Services. Please note that "User Hours" are defined as users of the Online Service and not users of this supplement.

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- Customer is explicitly prohibited from using the supplement to design and transmit promotional SMS messages either via the Twilio integration feature or as otherwise may be possible.

If you do not agree to these additional terms, do not install this supplement.

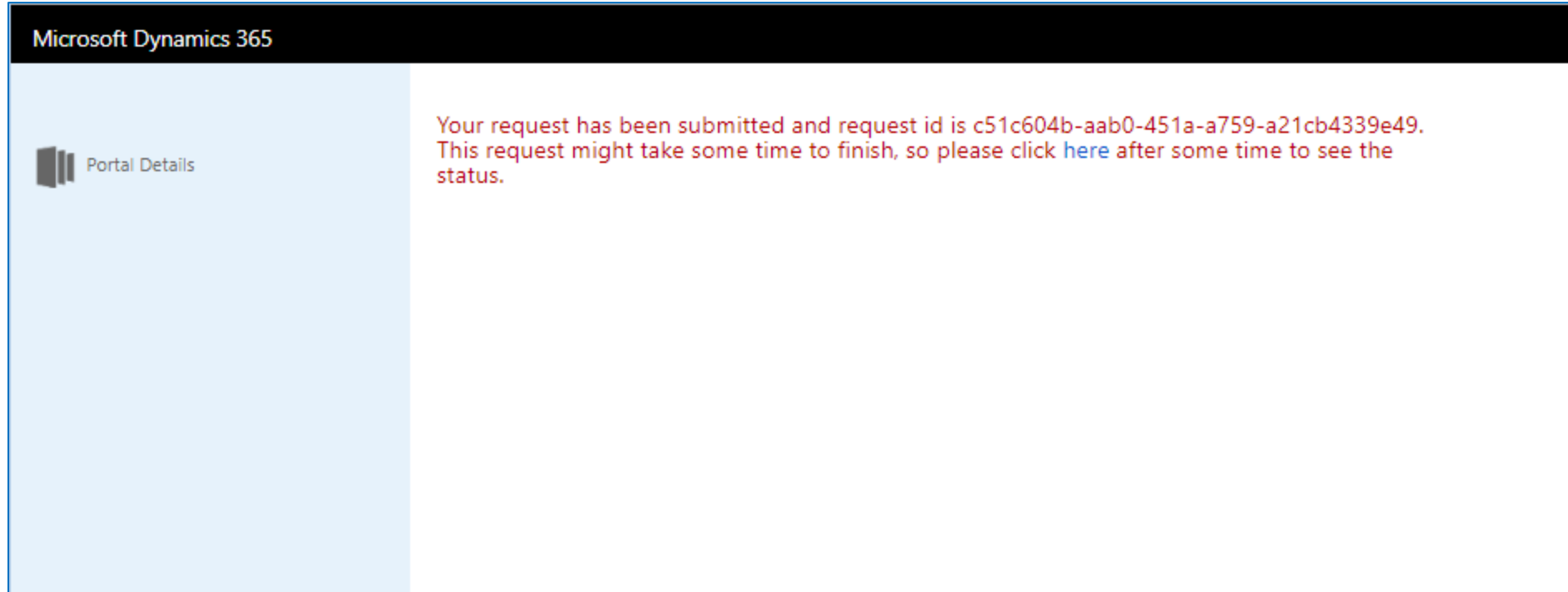
IMPORTANT: By installing this supplement, you consent to allow authorized users of Microsoft Dynamics 365 to configure and enable certain functionality, including but not limited to the following, which may:

By clicking accept, you are agreeing to the above terms of service agreement.

Accept

cancel

Introduction to Dynamics 365 Portals



Introduction to Dynamics 365 Portals

Microsoft Dynamics 365

Portal Details

This Portal is currently being configured and updates are not allowed. Please try again later.

Configure Your Portal

General Settings

*Name

ready365

*Type

Trial

Select Portal URL

*Portal URL

ready365

.microsoftcrmportals.com

You can update it to a vanity domain name once the portal is provisioned.

Select a Dynamics 365 instance

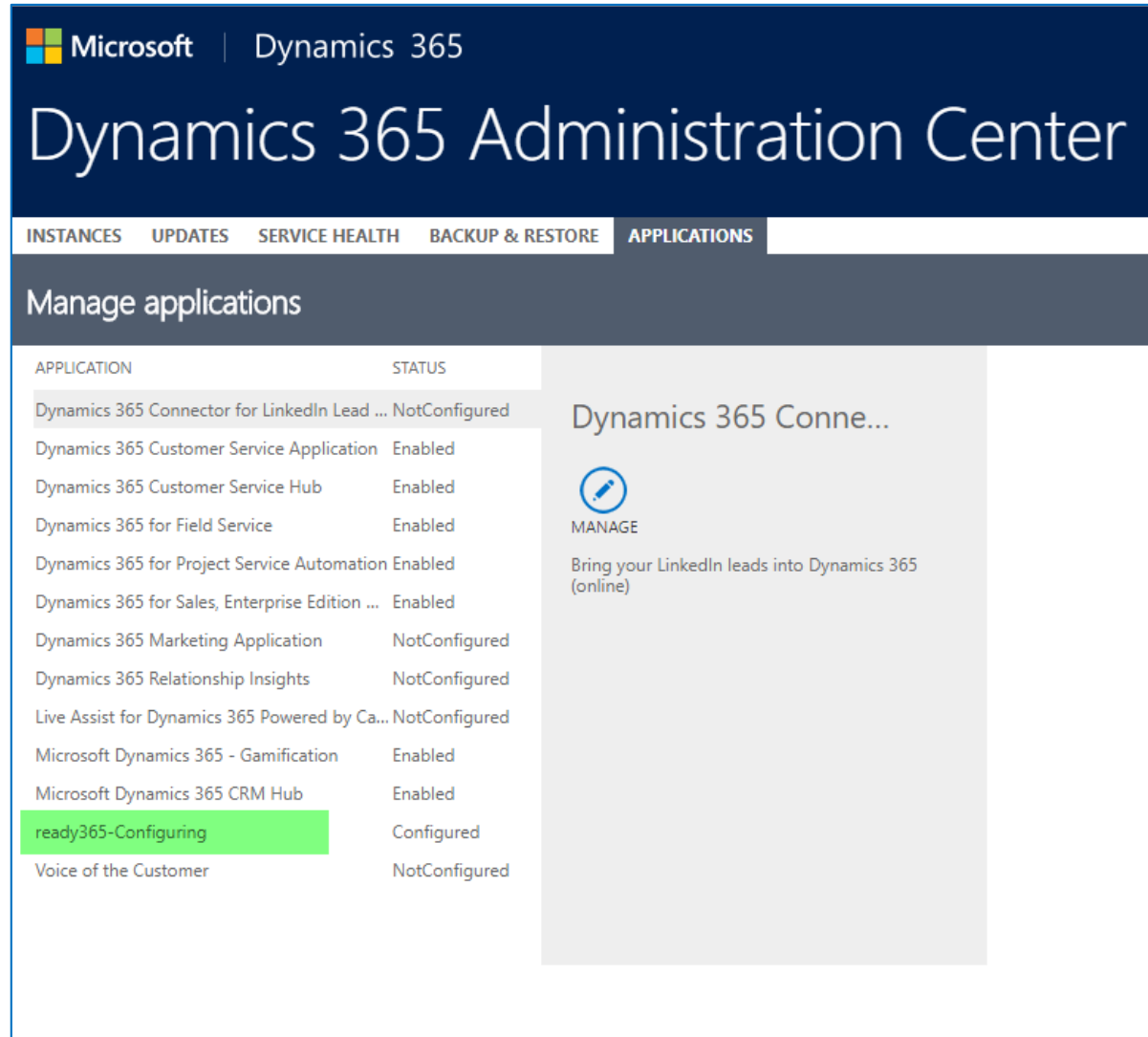
*Dynamics 365 Instance

ready365

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Introduction to Dynamics 365 Portals



The screenshot displays the Dynamics 365 Administration Center interface. At the top, the Microsoft logo and 'Dynamics 365' are visible. The main heading is 'Dynamics 365 Administration Center'. Below this, a navigation bar includes tabs for INSTANCES, UPDATES, SERVICE HEALTH, BACKUP & RESTORE, and APPLICATIONS. The 'Manage applications' section is active, showing a table of installed applications. The table has two columns: APPLICATION and STATUS. The first application, 'Dynamics 365 Connector for LinkedIn Lead ...', is highlighted in grey and has a status of 'NotConfigured'. To the right of this application, a detailed view is shown, including a 'MANAGE' button with a pencil icon and the text 'Bring your LinkedIn leads into Dynamics 365 (online)'. Other applications listed include 'Dynamics 365 Customer Service Application' (Enabled), 'Dynamics 365 Customer Service Hub' (Enabled), 'Dynamics 365 for Field Service' (Enabled), 'Dynamics 365 for Project Service Automation' (Enabled), 'Dynamics 365 for Sales, Enterprise Edition ...' (Enabled), 'Dynamics 365 Marketing Application' (NotConfigured), 'Dynamics 365 Relationship Insights' (NotConfigured), 'Live Assist for Dynamics 365 Powered by Ca...' (NotConfigured), 'Microsoft Dynamics 365 - Gamification' (Enabled), 'Microsoft Dynamics 365 CRM Hub' (Enabled), 'ready365-Configuring' (Configured), and 'Voice of the Customer' (NotConfigured).


APPLICATION	STATUS
Dynamics 365 Connector for LinkedIn Lead ...	NotConfigured
Dynamics 365 Customer Service Application	Enabled
Dynamics 365 Customer Service Hub	Enabled
Dynamics 365 for Field Service	Enabled
Dynamics 365 for Project Service Automation	Enabled
Dynamics 365 for Sales, Enterprise Edition ...	Enabled
Dynamics 365 Marketing Application	NotConfigured
Dynamics 365 Relationship Insights	NotConfigured
Live Assist for Dynamics 365 Powered by Ca...	NotConfigured
Microsoft Dynamics 365 - Gamification	Enabled
Microsoft Dynamics 365 CRM Hub	Enabled
ready365-Configuring	Configured
Voice of the Customer	NotConfigured

Dynamics 365 Conne...

 **MANAGE**

Bring your LinkedIn leads into Dynamics 365 (online)

Introduction to Dynamics 365 Portals

 Microsoft | Dynamics 365


Dynamics 365 Administration Center

INSTANCESUPDATESSERVICE HEALTHBACKUP & RESTOREAPPLICATIONS

Manage applications

APPLICATION	STATUS
Dynamics 365 Connector for LinkedIn Lead ...	NotConfigured
Dynamics 365 Customer Service Application	Enabled
Dynamics 365 Customer Service Hub	Enabled
Dynamics 365 for Field Service	Enabled
Dynamics 365 for Project Service Automation	Enabled
Dynamics 365 for Sales, Enterprise Edition ...	Enabled
Dynamics 365 Marketing Application	NotConfigured
Dynamics 365 Relationship Insights	NotConfigured
Live Assist for Dynamics 365 Powered by Ca...	NotConfigured
Microsoft Dynamics 365 - Gamification	Enabled
Microsoft Dynamics 365 CRM Hub	Enabled
ready365	Configured
Voice of the Customer	NotConfigured

Portal Add-On



MANAGE

Portal is an Add-On subscription for CRM Online that allows you to extend the engagement with Customer and Employee audiences into an Azure-hosted web portal. This Add-On requires a pre-existing CRM Online subscription and may only be associated with one instance per Portal. Each portal includes 1,000,000 page views per month.

Introduction to Dynamics 365 Portals

Microsoft Dynamics 365

Portal Details

Portal Actions

Manage Dynamics 365 Instance

Portal Analytics

Manage portal authentication key

Portal Details

General Settings

*Name

ready365

*Type

Trial

Portal URL

Base Portal URL

https://ready365.microsoftcrmportals.com

Portal Audience

*Portal Audience

Customer

Update Portal Binding

*Select Website Record

Custom Portal

Change Portal State

*Portal State

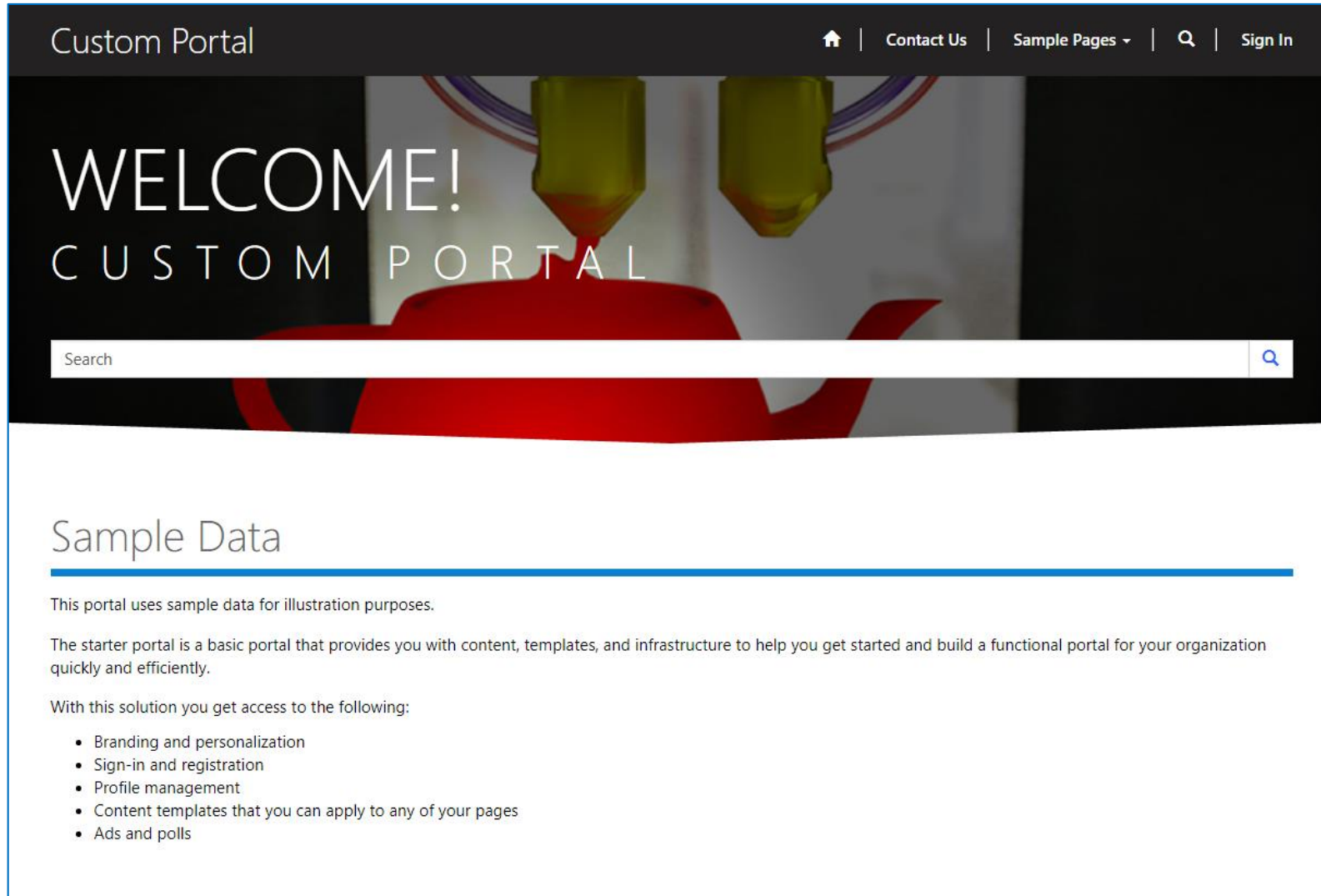
On

☐ Enable portal for early upgrade

If you are a Global Administrator, click [here](#) to provide consent to your Dynamics 365 portals.

Update

Introduction to Dynamics 365 Portals



Introduction to Dynamics 365 Portals

Administrator

The screenshot displays the Dynamics 365 Administrator portal. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts > System Administrator >'. A secondary bar contains action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'CREATE INVITATION', and a highlighted 'CHANGE PASSWORD' button. Below this, a user profile for 'System Administrator' is shown. The main content area is divided into two sections. On the left, the 'Summary' tab is active, showing 'CONTACT INFORMATION' with fields for Full Name (System Administrator), Job Title, Account Name, Email (admin@contoso.com), Business Phone (425-555-5555), Mobile Phone, Fax, Preferred Method of C (Any), and Address (8201 164th Avenue NE, Suite 200, Redmond, WA 98052, USA). On the right, the 'POSTS' tab is active, featuring a text input field 'Enter post here', a 'POST' button, and a list of tabs: 'All posts', 'Auto posts', and 'User posts'. The 'All posts' tab is selected, showing a message: 'There aren't any posts to show. To get started, add a post.'

Navigation: Dynamics 365 | Sales | Contacts > System Administrator >

Actions: + NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, CREATE INVITATION, CHANGE PASSWORD

User Profile: CONTACT | System Administrator

Summary

CONTACT INFORMATION

- * Full Name: System Administrator
- Job Title:
- Account Name:
- Email: admin@contoso.com
- Business Phone: 425-555-5555
- Mobile Phone:
- Fax:
- Preferred Method of C: Any
- Address: 8201 164th Avenue NE, Suite 200, Redmond, WA 98052, USA

POSTS | ASSISTANT | ACTIVITIES | NOTES

Enter post here

POST

All posts | Auto posts | User posts

There aren't any posts to show. To get started, add a post.

Introduction to Dynamics 365 Portals

Administrator – Web Role

The screenshot displays the Dynamics 365 System Administrator interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts > System Administrator'. The main header shows 'CONTACT : PORTAL CONTACT' and 'System Administrator'. The right side of the header displays user information: 'E-mail: admin@contoso.com', 'Preferred Method of Contact: Any', and 'Owner: SYSTEM'. Below the header, the 'Web Role Associated View' is shown with a search bar. The view contains a table with two columns: 'Name' and 'Website'. The table lists 'Administrators' and 'Custom Portal'. The bottom of the interface shows a status bar with '1 - 1 of 1', 'All', and a list of columns (A-Z). The status is 'Active'.

CONTACT : PORTAL CONTACT

System Administrator

E-mail: admin@contoso.com

Preferred Method of Contact: Any

* Owner: SYSTEM

Web Role Associated View

Search for records

ADD EXISTING WEB ROLE BULK DELETE CHART PANE RUN REPORT EXCEL TEMPLATES EXPORT WEB ROLES

Name	Website
Administrators	Custom Portal

1 - 1 of 1 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 Page 1

Status: Active

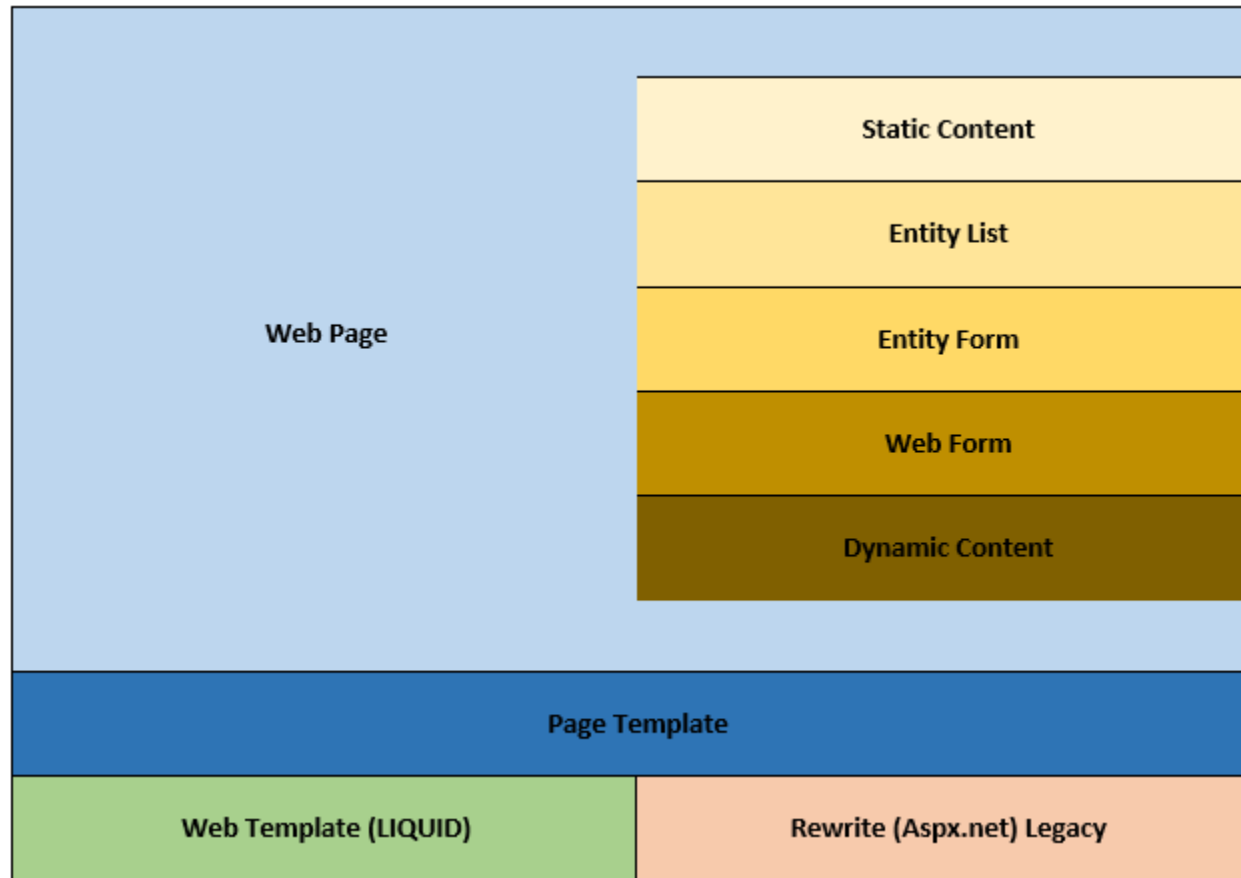
Active

Introduction to Dynamics 365 Portals

- A bit of portal theory



Introduction to Dynamics 365 Portals



Introduction to Dynamics 365 Portals

The screenshot shows the Dynamics 365 Portals interface for configuring a 'Full Page' web template. The top navigation bar includes 'Dynamics 365', 'Portals', and 'Web Templates > Full Page'. Below this is a toolbar with actions: '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'FLOWS', 'WORD TEMPLATES', 'RUN REPORT', and a menu icon. The main section is titled 'WEB TEMPLATE : INFORMATION' and 'Full Page'. A 'General' tab is selected, showing fields for 'Name' (Full Page), 'Website' (Custom Portal), and 'Source' (a code editor). The 'Source' field contains a Liquid template snippet. At the bottom, there is a 'MIME Type' field.

WEB TEMPLATE : INFORMATION
Full Page

General

*Name: Full Page

*Website: Custom Portal

Source

```
1 {% extends 'Layout 1 Column' %}
2
3 {% block main %}
4   {% include 'Page Copy' %}
5   {% include 'Child Navigation' showdescriptions: true %}
6   {% if page.adx_entitylist %}
7     {% include 'entity_list' key: page.adx_entitylist.id %}
8   {% endif %}
9
10  {% if page.adx_entityform %}
11    {% entityform id: page.adx_entityform.id %}
12  {% endif %}
13
14  {% if page.adx_webform %}
15    {% webform id: page.adx_webform.id %}
16  {% endif %}
17 {% endblock %}
```

MIME Type

Introduction to Dynamics 365 Portals

Requirement

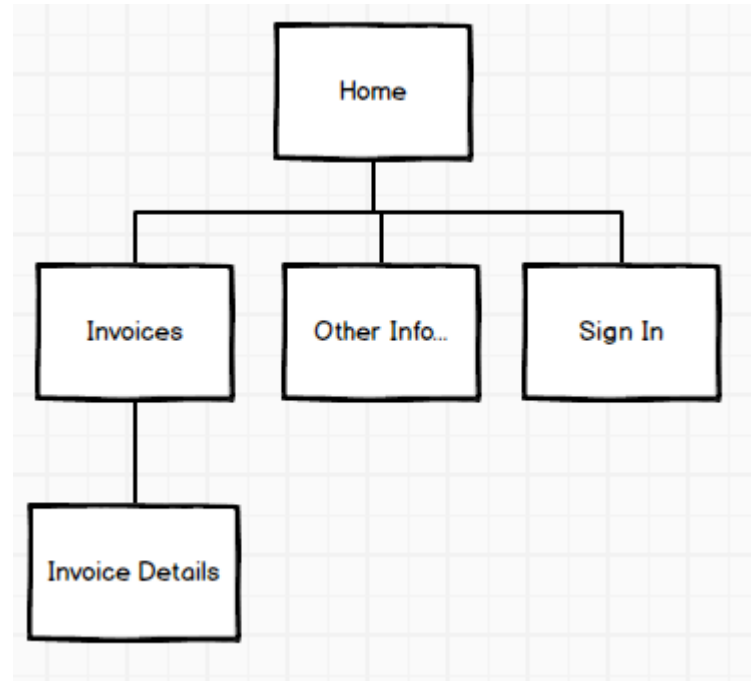
- We want our customers to be able to view invoice details on a portal
- We only want customer users that we have designated as being able to view invoice data



Created by Håkan Forss @hakanforss <http://hakanforss.wordpress.com>

Introduction to Dynamics 365 Portals

Design – Site Map



Introduction to Dynamics 365 Portals

Design – Web Pages

A Web Page

⬅ ➡ ✕ 🏠 http:// 🔍

My Invoices

Invoice ID	Customer	Due Date	Is Re	Total
INV-01200	ABC Co	2018-03-30	New	\$1100
INV-01345	ABC Co	2018-05-12	New	\$132
INV-01500	ABC Co	2018-04-15	New	\$450

A Web Page

⬅ ➡ ✕ 🏠 http:// 🔍

Invoice

Due Date 📅

Status

Product	Qty	Amount
Stuff	3	\$23
More Stuff	1	\$100
Total		<input type="text" value="\$123"/>

Introduction to Dynamics 365 Portals

Portal – Invite Users

Dynamics 365 | **Portals** | **Contacts** > Maria Campbell (sa... >

CONTACT : PORTAL CONTACT | E-mail: someone_d@example.com | Preferred Method of Contact: Any | Owner: Nick Doelman

General

Salutation	-----	Business Phone	555-0103
* First Name	Maria	Home Phone	-----
Middle Name	-----	Mobile Phone	-----
* Last Name	Campbell (sample)	Fax	-----
Job Title	Purchasing Manager	E-mail	someone_d@example.com
Company Name	Fabrikam, Inc. (sample)	Time Zone	-----
		Preferred Language	-----

Address

Address Type	-----	City	Monroe
Address Name	-----	State/Province	WA
Street	3747 Likins Avenue	ZIP/Postal Code	37925
Street 2	-----	Country/Region	U.S.

Status: Active

Active

Introduction to Dynamics 365 Portals

Portal – Invite Users

The screenshot shows the Dynamics 365 Portals interface for inviting a user. The breadcrumb trail is 'Dynamics 365 > Portals > Invitations > Scott Konersmann (s...'. The form title is 'INVITATION : INFORMATION' with a sub-header 'Scott Konersmann (sample)'. A 'Status Reason' field shows 'New'. The 'General' section contains fields for Name (Scott Konersmann (sample)), Expiry Date, Type (Single), Inviter, and Owner/Sender (Nick Doelman). The 'Invitee' section shows the invited contact as Scott Konersmann (sample). The 'When Redeemed' section includes 'Assign To Account' (City Power & Light (sample)) and 'Execute Workflow on Redeeming Contact'. The 'Assign To Web Roles' section is currently empty with a message 'To enable this content, create the record.' The bottom of the form shows 'Active' status and fields for 'Created On' and 'Modified On'.

INVITATION : INFORMATION			
Scott Konersmann (sample)			Status Reason
New			
General			
* Name	Scott Konersmann (sample)	* Expiry Date	
* Type	Single	Inviter	
* Owner/Sender	Nick Doelman		
Invitee			
Invited Contact	Scott Konersmann (sample)		
When Redeemed			
Assign To Account	City Power & Light (sample)		
Execute Workflow on Redeeming Contact			
Assign To Web Roles			
Name ↑	Website		
To enable this content, create the record.			
Active	Created On	Modified On	

Introduction to Dynamics 365 Portals

Portal – Invite Users

Custom Portal

[Home](#) | [Contact Us](#) | [Sample Pages](#) | [Invoices](#) | [Search](#) | [Sign In](#)

[Sign In](#) | [Register](#) | [Redeem Invitation](#)

Sign up with an invitation code

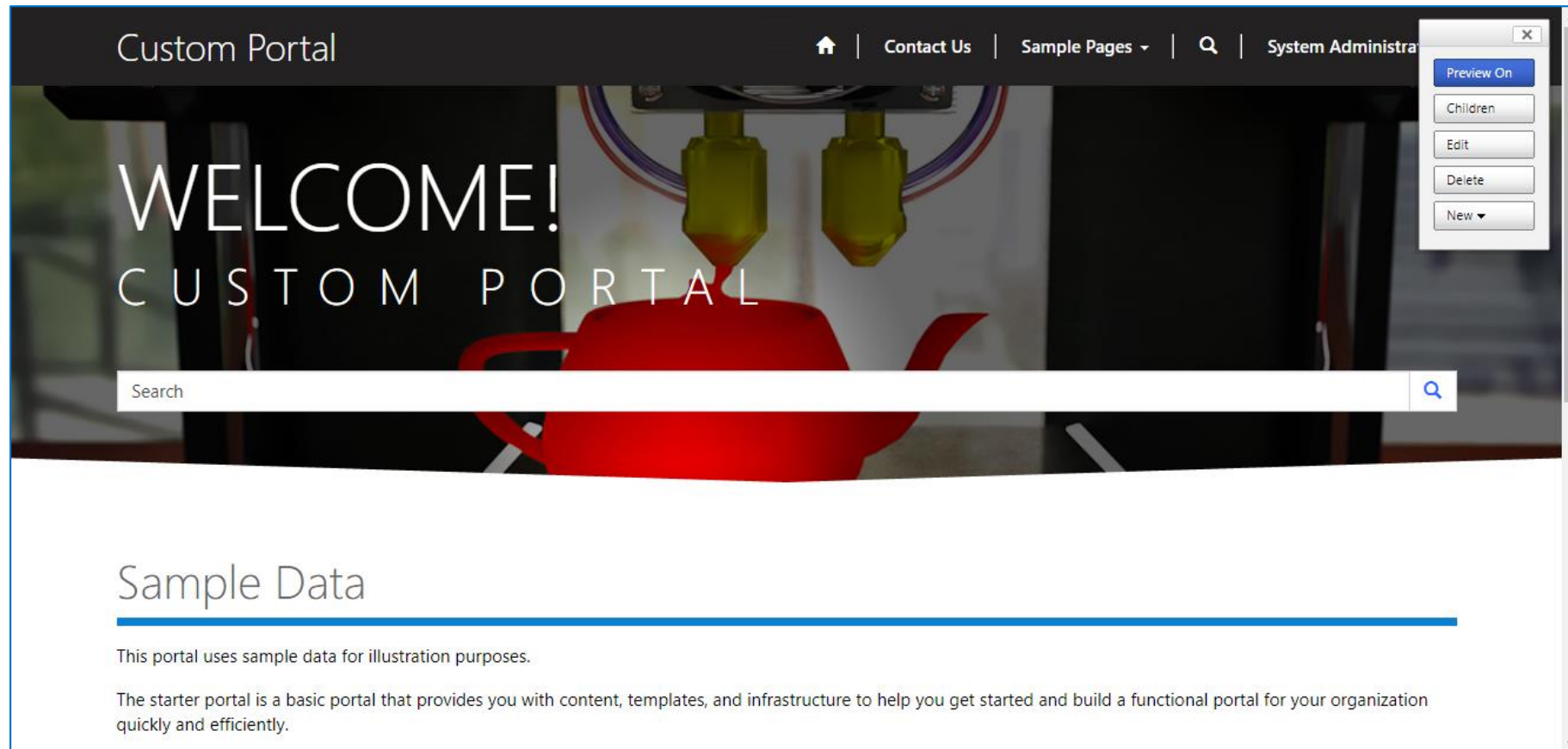
* Invitation Code

☐ I have an existing account

Register

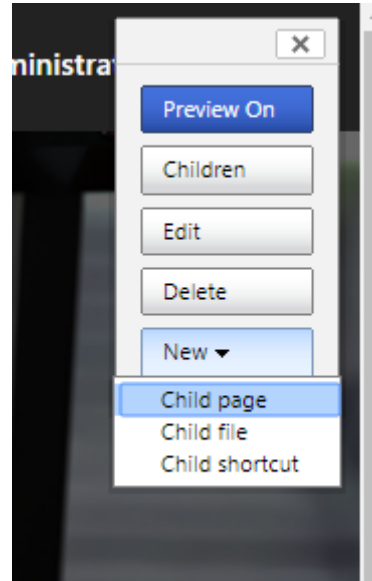
Introduction to Dynamics 365 Portals

Build – Web Pages



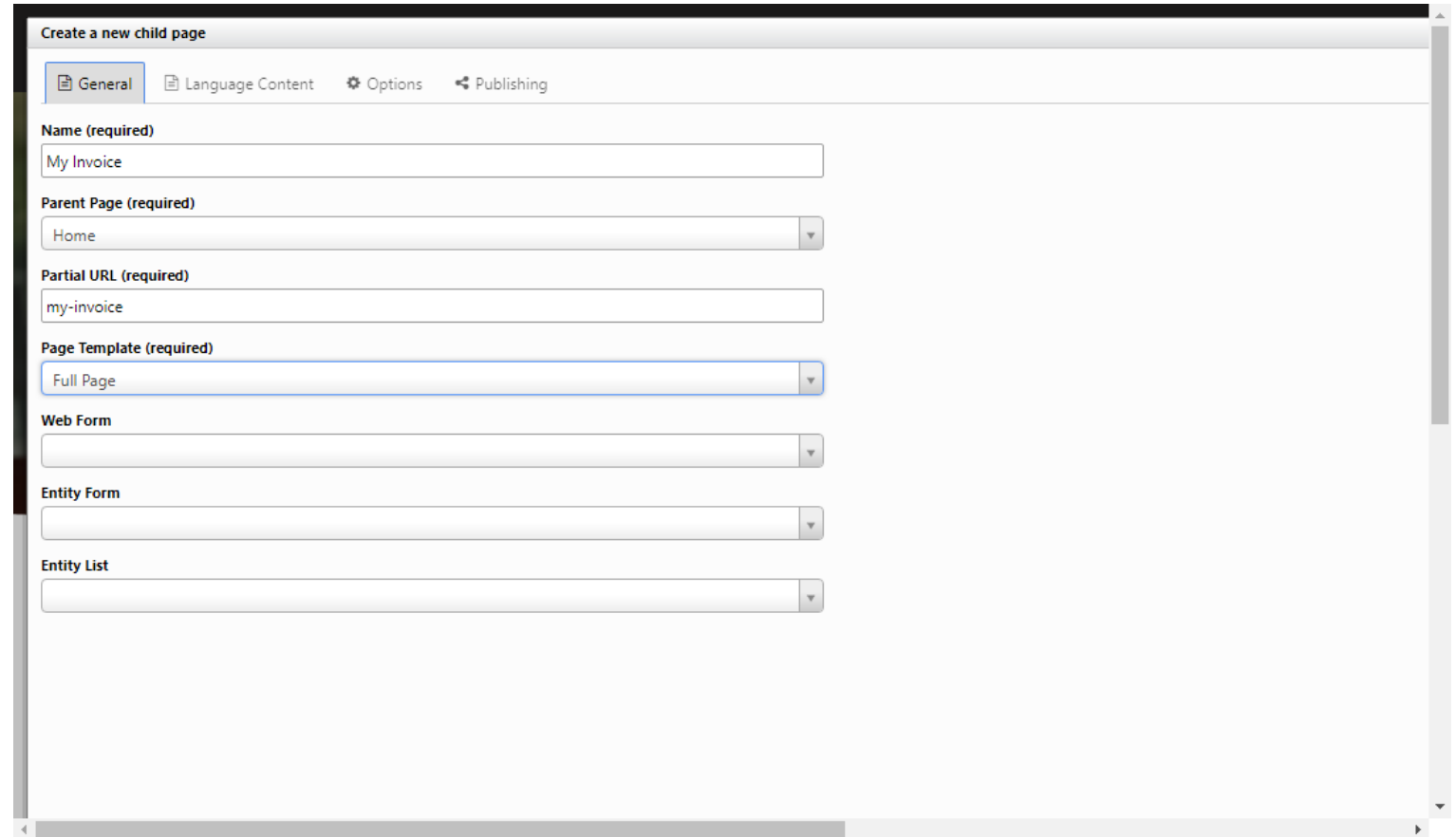
Introduction to Dynamics 365 Portals

Build – Web Pages



Introduction to Dynamics 365 Portals

Build – Web Pages



The screenshot shows the 'Create a new child page' form in Dynamics 365 Portals. The form has a title bar 'Create a new child page' and a tabbed interface with 'General', 'Language Content', 'Options', and 'Publishing' tabs. The 'General' tab is active. The form contains several required fields: 'Name (required)' with the value 'My Invoice', 'Parent Page (required)' with a dropdown menu showing 'Home', 'Partial URL (required)' with the value 'my-invoice', and 'Page Template (required)' with a dropdown menu showing 'Full Page'. Below these are three optional fields: 'Web Form', 'Entity Form', and 'Entity List', each with a dropdown menu.

Create a new child page

General Language Content Options Publishing

Name (required)
My Invoice

Parent Page (required)
Home

Partial URL (required)
my-invoice

Page Template (required)
Full Page

Web Form

Entity Form

Entity List

Introduction to Dynamics 365 Portals

Build – Web Pages

Create a new child page

General Language Content Options Publishing

Language
English

Publishing State (required)
Published

Title
My Invoices

Copy

Here are a list of your invoices.

Save Cancel

Introduction to Dynamics 365 Portals

Build – Web Pages

Create a new child page

General Language Content Options Publishing

Language
English

Publishing State (required)
Published

Title
My Invoices

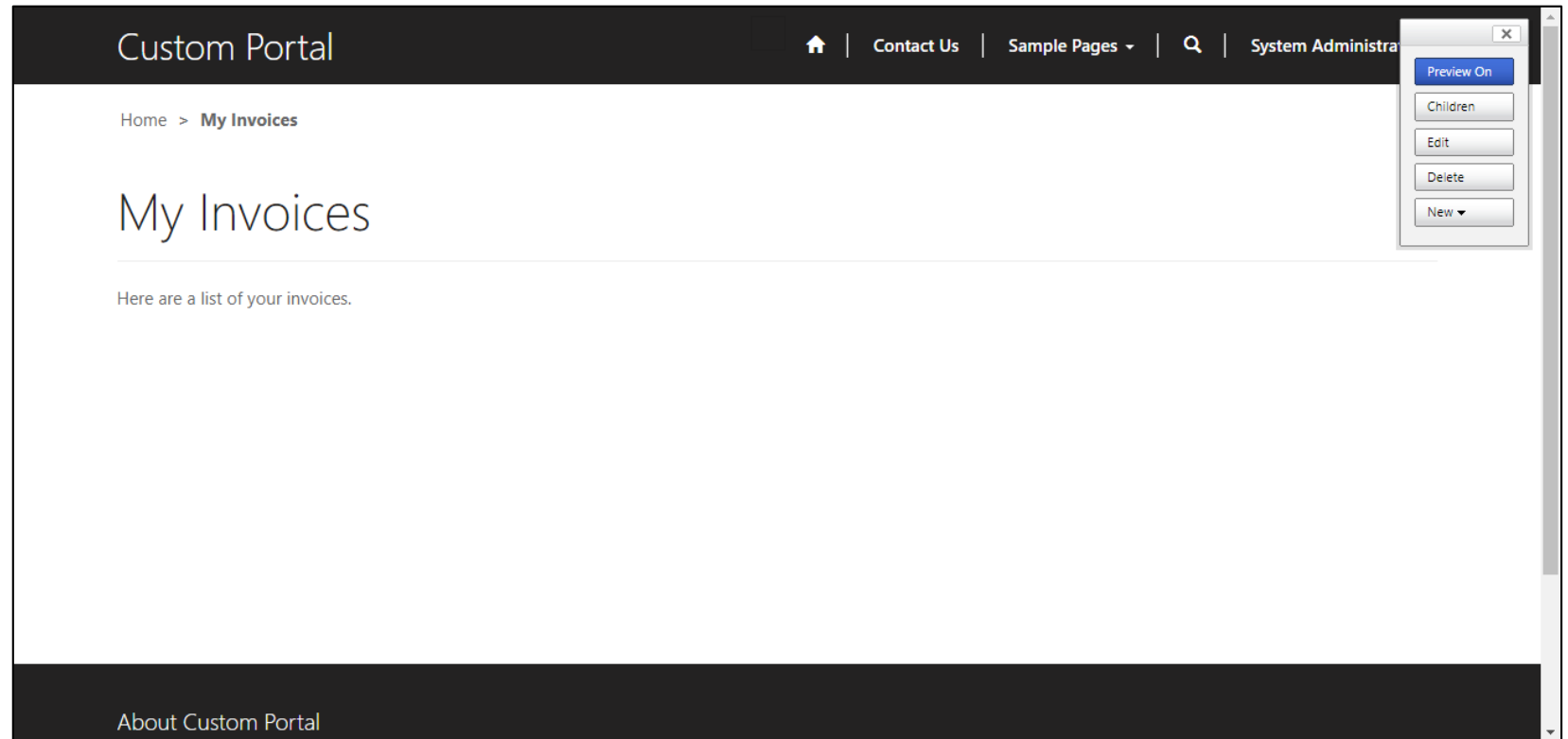
Copy

Here are a list of your invoices.

Save Cancel

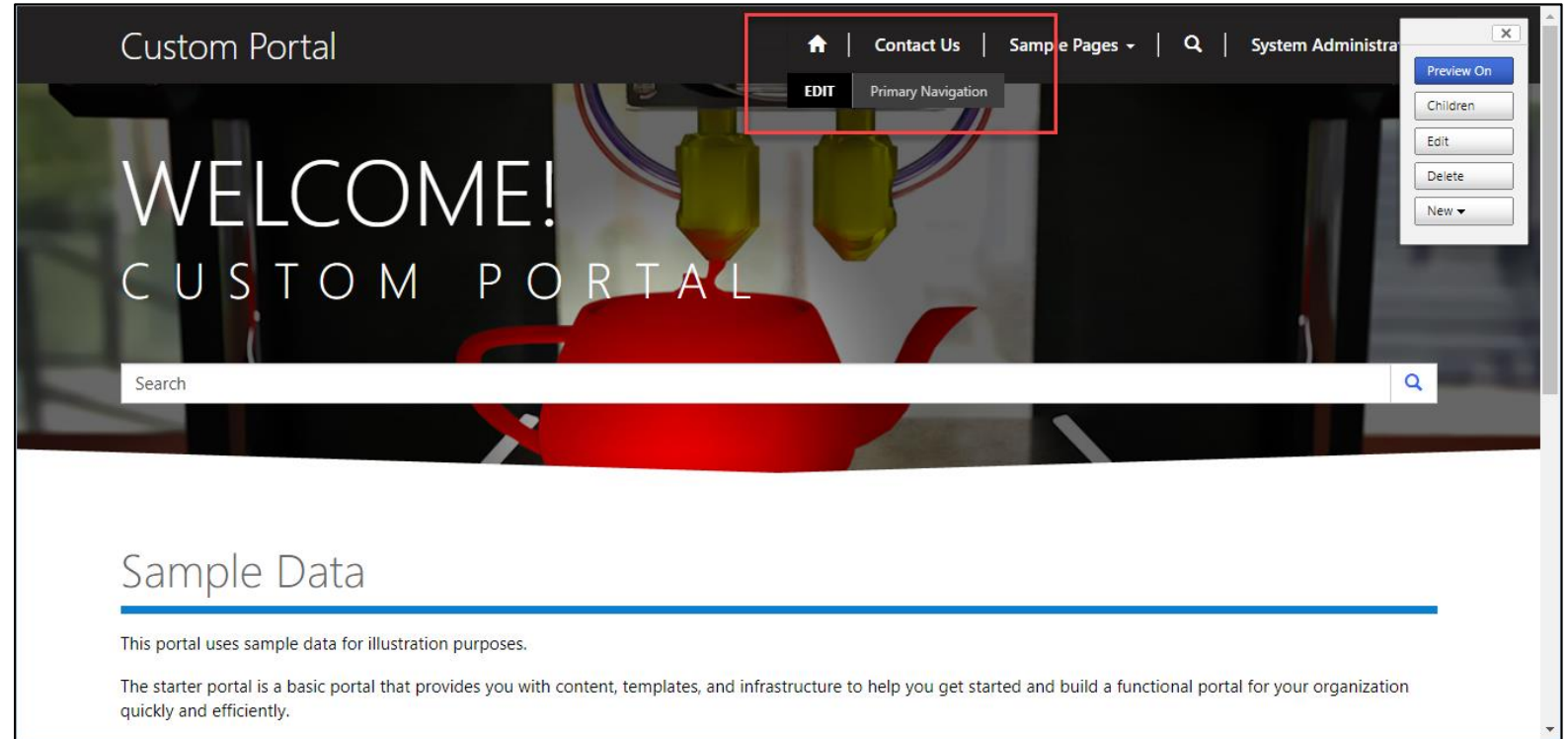
Introduction to Dynamics 365 Portals

Build – Web Pages



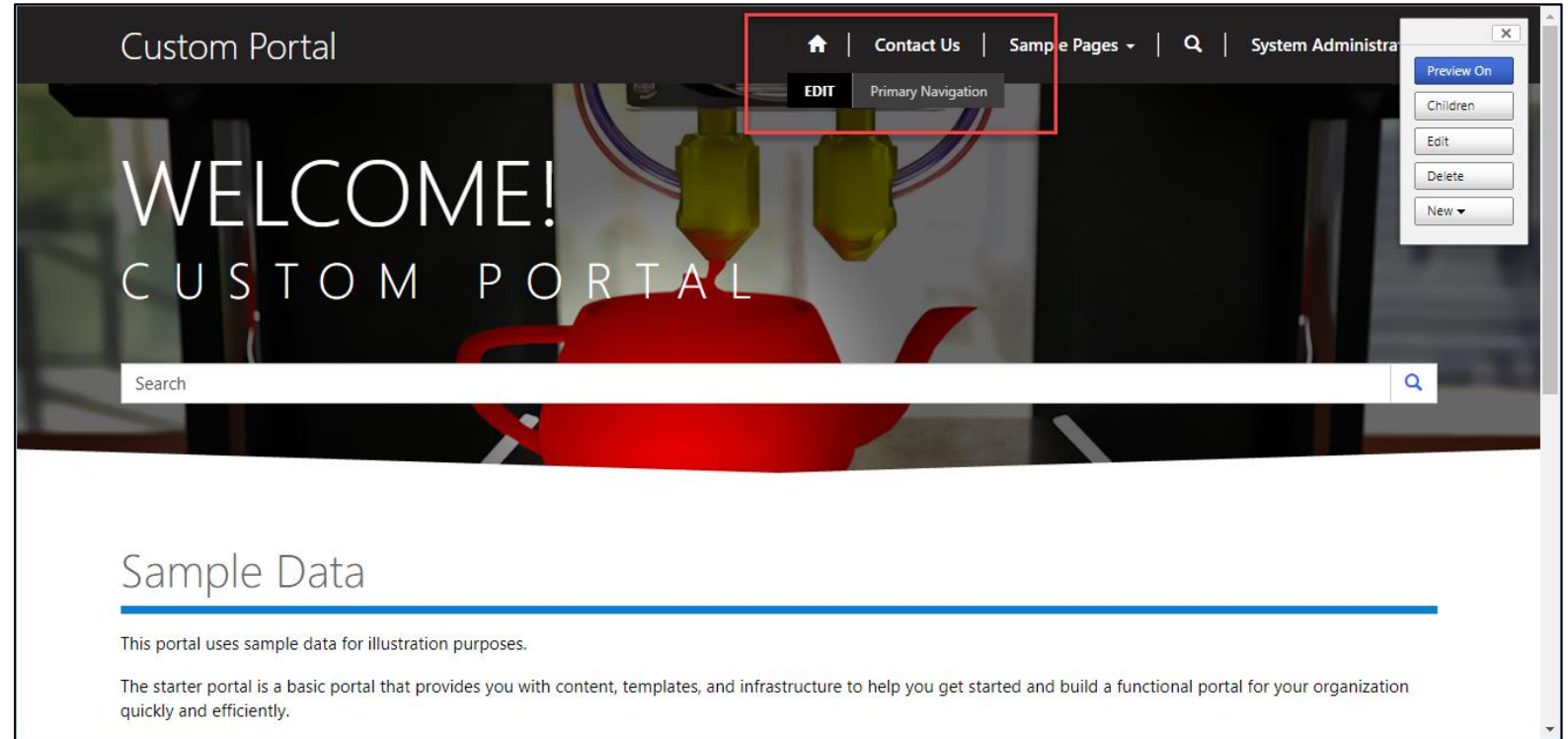
Introduction to Dynamics 365 Portals

Build – Web Pages



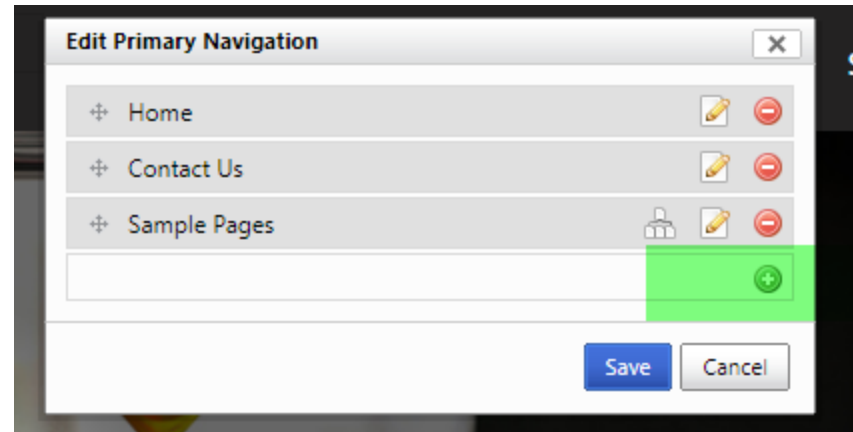
Introduction to Dynamics 365 Portals

Build – Web Link



Introduction to Dynamics 365 Portals

Build – Web Link



Introduction to Dynamics 365 Portals

Build – Web Link

The screenshot shows the 'Add a new link' dialog box in Dynamics 365 Portals. The dialog is divided into several sections for configuring a new web link.

Name (required): A text field containing 'My Invoices'.

Page: A dropdown menu showing 'My Invoices'.

External URL: An empty text field.

Description: A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, and other formatting options. The description area is currently empty.

Publishing State (required): A dropdown menu showing 'Published'.

Image URL: An empty text field.

Image Height: An empty text field.

Image Width: An empty text field.

Image Alternate Text: An empty text field.

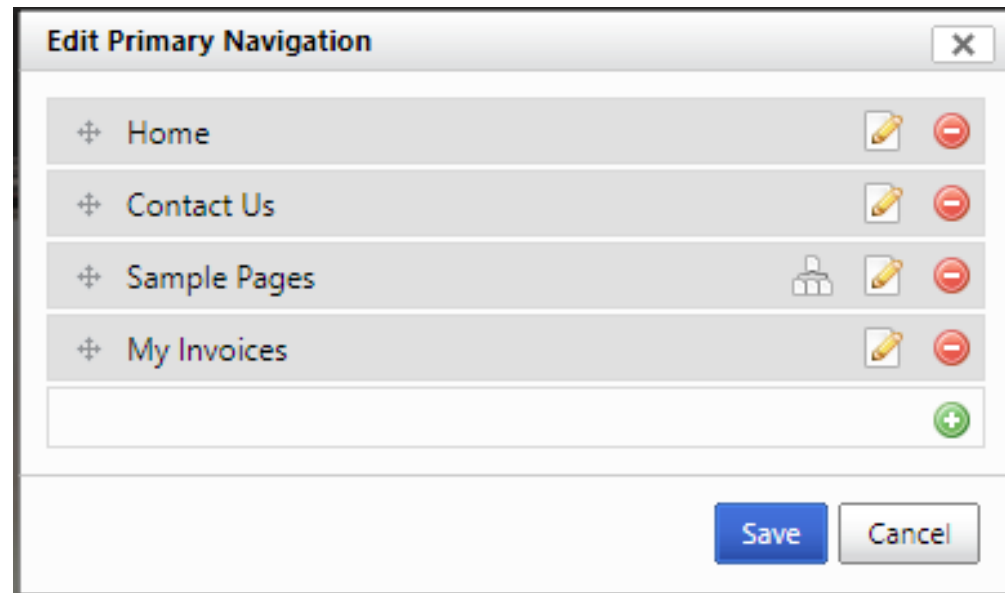
Options: A list of checkboxes for additional settings:

- ☐ Display image only
- ☒ Robots follow link
- ☐ Open in new window
- ☐ Disable page validation
- ☐ Display page child links

At the bottom right, there are 'Save' and 'Cancel' buttons.

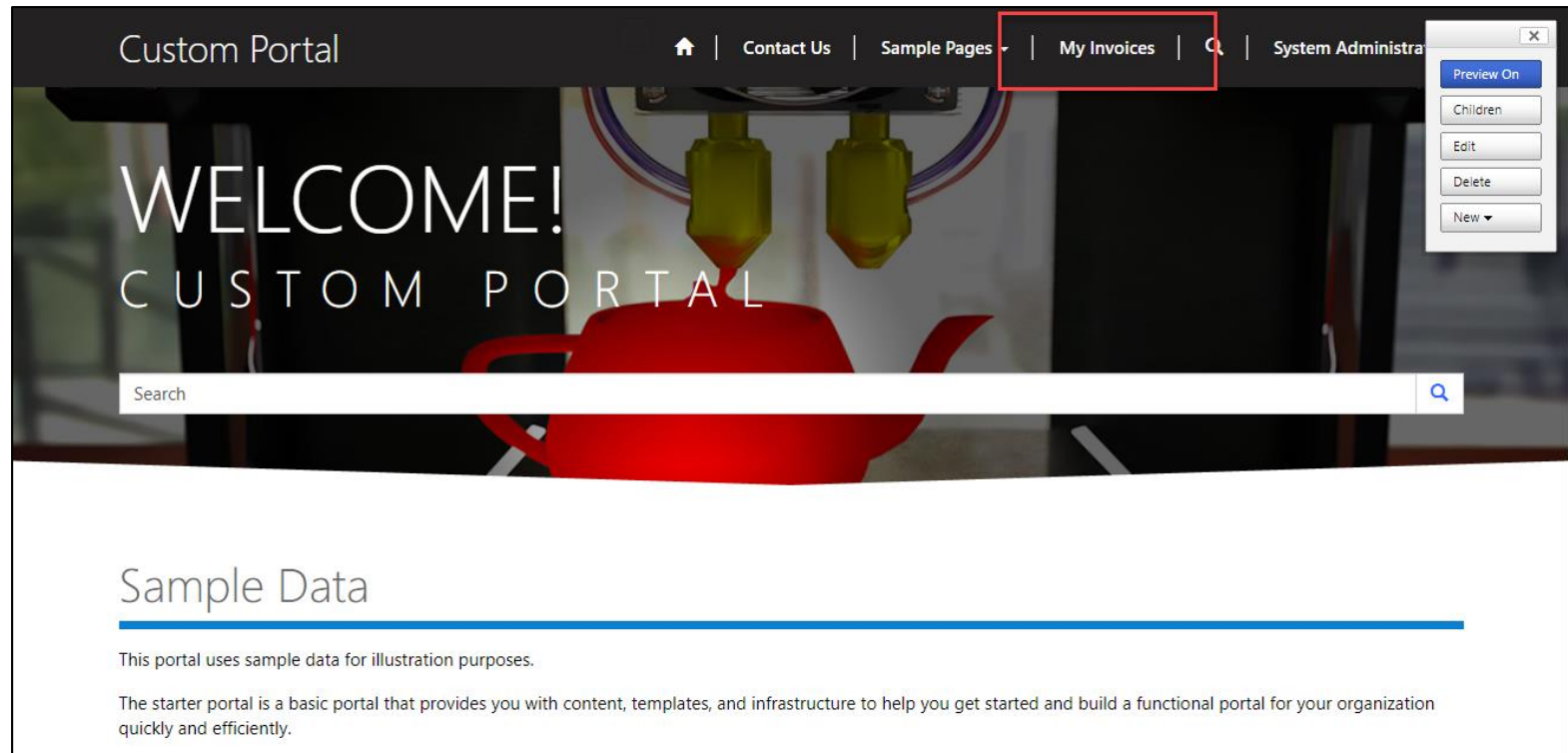
Introduction to Dynamics 365 Portals

Build – Web Link



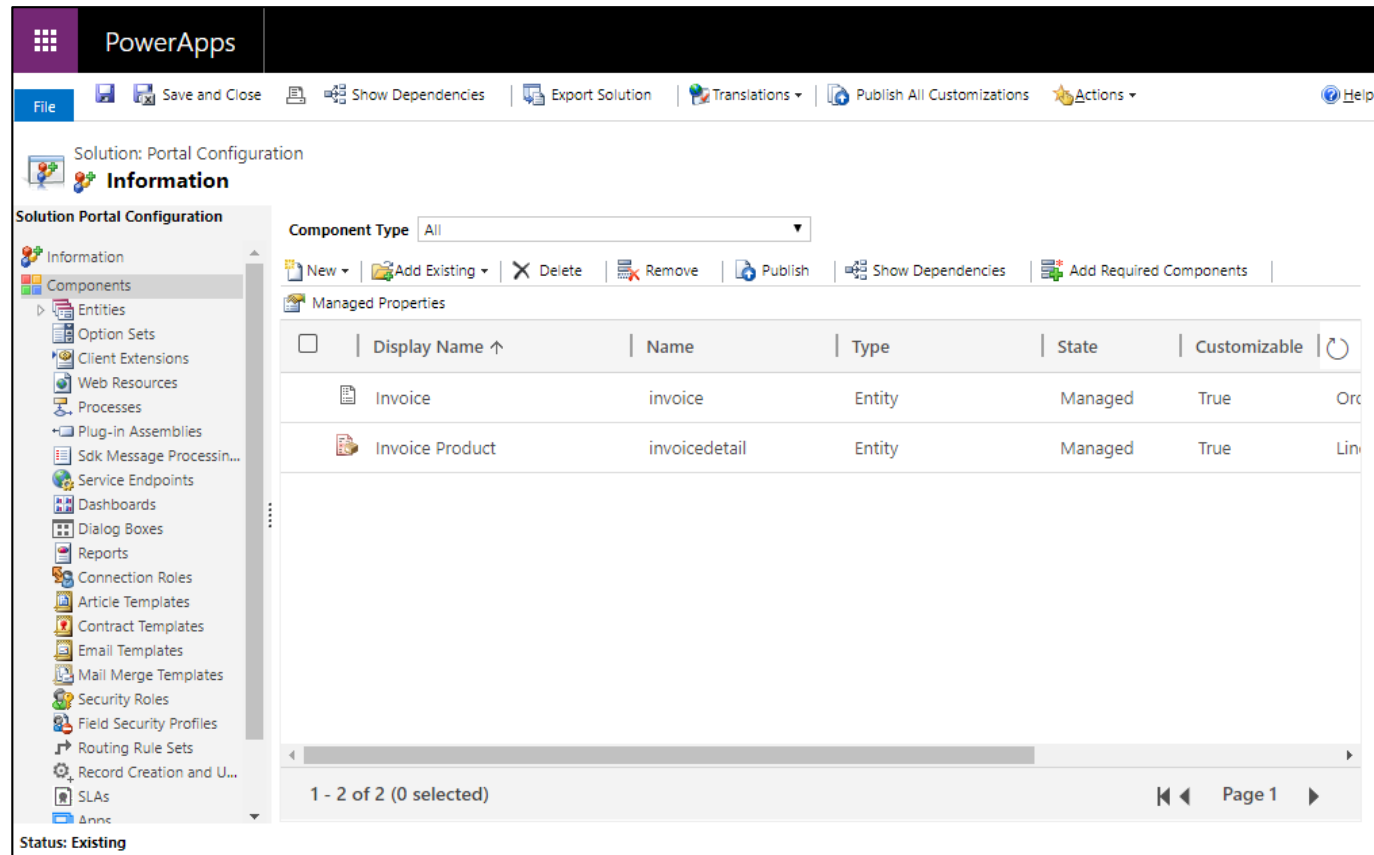
Introduction to Dynamics 365 Portals

Build – Web Link



Introduction to Dynamics 365 Portals

Build – D365 Forms and Views for Portals

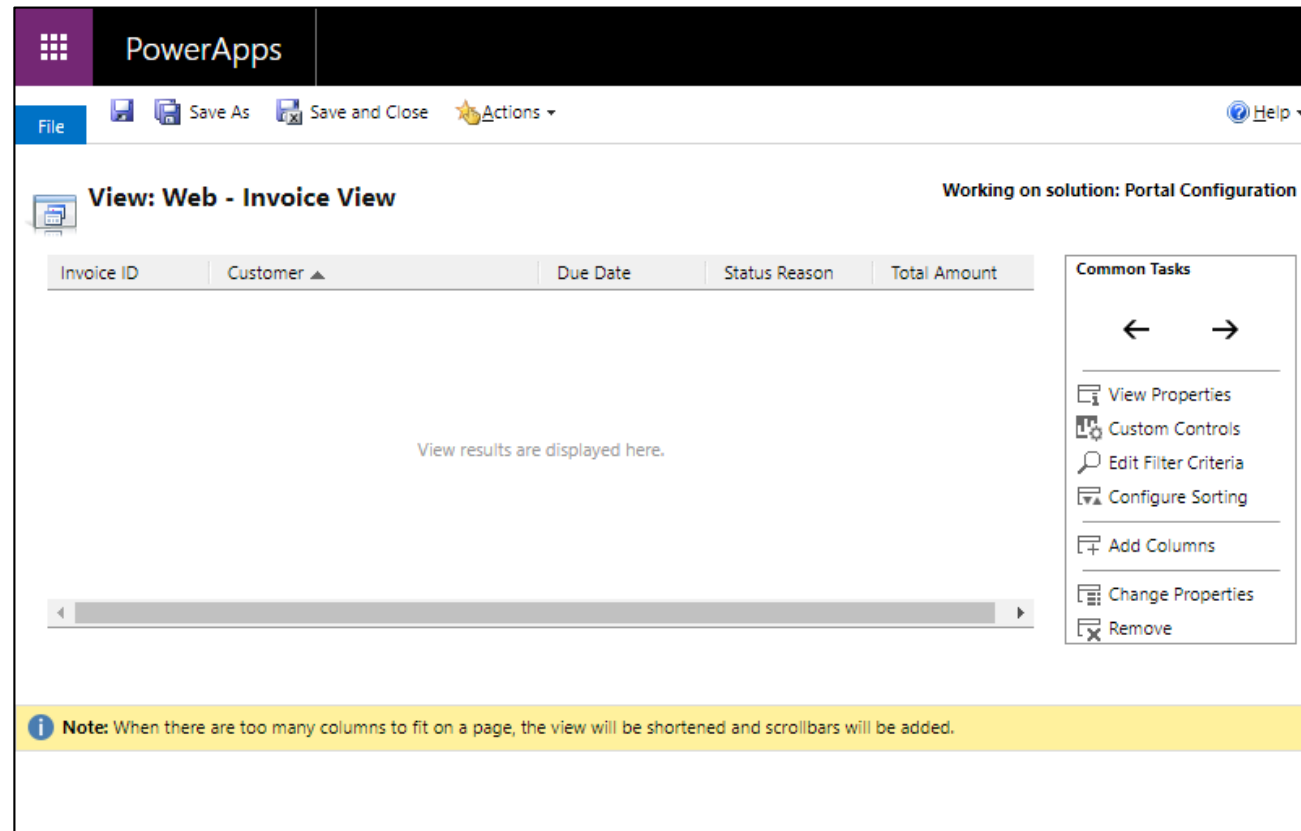


The screenshot displays the PowerApps interface for 'Solution: Portal Configuration'. The left sidebar shows a tree view with 'Components' expanded, listing various portal elements like Entities, Option Sets, and Web Resources. The main area features a 'Managed Properties' table with columns for Display Name, Name, Type, State, Customizable, and a refresh icon. Two rows are visible: 'Invoice' (Entity, Managed, True) and 'Invoice Product' (Entity, Managed, True). The bottom status bar indicates 'Status: Existing' and '1 - 2 of 2 (0 selected)'.

	Display Name ↑	Name	Type	State	Customizable	
	Invoice	invoice	Entity	Managed	True	Or...
	Invoice Product	invoicedetail	Entity	Managed	True	Lin...

Introduction to Dynamics 365 Portals

Build – D365 Forms and Views for Portals



Introduction to Dynamics 365 Portals

Build – D365 Forms and Views for Portals

The screenshot displays the PowerApps editor for a 'Web - Invoice Form'. The interface includes a top navigation bar with 'FILE', 'HOME', and 'INSERT' tabs. Below this is a ribbon with various tool groups: 'Save' (Save, Save As, Save and Close, Publish), 'Edit' (Change Properties, Remove, Undo, Redo), 'Form' (Header, Footer, Body, Navigation, Business Rules, Form Properties, Preview, Show Dependencies, Managed Properties, Merge Forms, Upgrade), and 'Enable Security Roles'. The main workspace shows a 'Solution: Portal Configuration' with a 'Form: Invoice'. The form is divided into sections: 'Summary', 'INVOICE INFORMATION', and 'Invoice Products (Invoice ID)'. The 'Summary' section contains fields for 'Invoice ID *', 'Name *', 'Customer *', 'Due Date', 'Currency *', 'Price List *', 'Shipping Method', 'Ship To', 'Bill To Address', and 'Ship To Address'. The 'Invoice Products' section is currently empty. The right-hand side features a 'Field Explorer' with a filter set to 'All Fields' and a checkbox for 'Only show unused fields'. A list of fields is shown, including 'Bill To City', 'Bill To Country/Region', 'Bill To Fax', 'Bill To Name', 'Bill To Phone', 'Bill To State/Province', 'Bill To Street 1', 'Bill To Street 2', 'Bill To Street 3', 'Bill To ZIP/Postal Code', 'Created By', 'Created By (Delegate)', 'Created On', 'Date Delivered', 'Description', 'Email Address', 'Exchange Rate', and 'Freight Amount'. A 'New Field' button is located at the bottom of the field list.

PowerApps

FILE HOME INSERT

Save Save As Save and Close Publish

Change Properties Remove Undo Redo

Header Footer Body Navigation

Business Rules Form Properties Preview Show Dependencies Managed Properties Merge Forms Upgrade

Solution: Portal Configuration

Form: Invoice

Summary

INVOICE INFORMATION

Invoice ID * Invoice ID Price List * Price List

Name * Name Shipping Method Shipping Method

Customer * Customer Ship To Ship To

Due Date Due Date Bill To Address Bill To Address

Currency * Currency Ship To Address Ship To Address

Invoice Products (Invoice ID)

Spacer Total Tax Total Tax

Spacer Total Detail Amount Total Detail Amount

Spacer Total Amount Total Amount

Field Explorer

Filter All Fields

Only show unused fields

Bill To City

Bill To Country/Region

Bill To Fax

Bill To Name

Bill To Phone

Bill To State/Province

Bill To Street 1

Bill To Street 2

Bill To Street 3

Bill To ZIP/Postal Code

Created By

Created By (Delegate)

Created On

Date Delivered

Description

Email Address

Exchange Rate

Freight Amount

New Field

Introduction to Dynamics 365 Portals

Build – D365 Forms and Views for Portals

The screenshot displays the PowerApps editor for a 'Web - Invoice Form'. The interface includes a top navigation bar with 'FILE', 'HOME', and 'INSERT' tabs. Below this is a ribbon with various tool groups: 'Save' (Save, Save As, Save and Close, Publish), 'Edit' (Change Properties, Remove, Undo, Redo), 'Form' (Header, Footer, Body, Navigation, Business Rules, Form Properties, Preview, Show Dependencies, Managed Properties, Merge Forms, Upgrade), and 'Enable Security Roles'. The main workspace shows a 'Solution: Portal Configuration' with a 'Form: Invoice'. The form is divided into sections: 'Summary', 'INVOICE INFORMATION', and 'Invoice Products (Invoice ID)'. The 'Summary' section contains fields for 'Invoice ID *', 'Name *', 'Customer *', 'Due Date', 'Currency *', 'Price List *', 'Shipping Method', 'Ship To', 'Bill To Address', and 'Ship To Address'. The 'Invoice Products' section is currently empty. The right-hand side features a 'Field Explorer' with a filter set to 'All Fields' and a checkbox for 'Only show unused fields'. A list of fields is shown, including 'Bill To City', 'Bill To Country/Region', 'Bill To Fax', 'Bill To Name', 'Bill To Phone', 'Bill To State/Province', 'Bill To Street 1', 'Bill To Street 2', 'Bill To Street 3', 'Bill To ZIP/Postal Code', 'Created By', 'Created By (Delegate)', 'Created On', 'Date Delivered', 'Description', 'Email Address', 'Exchange Rate', and 'Freight Amount'. A 'New Field' button is located at the bottom of the field list.

PowerApps

FILE HOME INSERT

Save Save As Save and Close Publish

Change Properties Remove Undo Redo

Header Footer Body Navigation

Business Rules Form Properties Preview Show Dependencies Managed Properties Merge Forms Upgrade

Solution: Portal Configuration

Form: Invoice

Summary

INVOICE INFORMATION

Invoice ID * Invoice ID Price List * Price List

Name * Name Shipping Method Shipping Method

Customer * Customer Ship To Ship To

Due Date Due Date Bill To Address Bill To Address

Currency * Currency Ship To Address Ship To Address

Invoice Products (Invoice ID)

Spacer Total Tax Total Tax

Spacer Total Detail Amount Total Detail Amount

Spacer Total Amount Total Amount

Field Explorer

Filter All Fields

Only show unused fields

Bill To City

Bill To Country/Region

Bill To Fax

Bill To Name

Bill To Phone

Bill To State/Province

Bill To Street 1

Bill To Street 2

Bill To Street 3

Bill To ZIP/Postal Code

Created By

Created By (Delegate)

Created On

Date Delivered

Description

Email Address

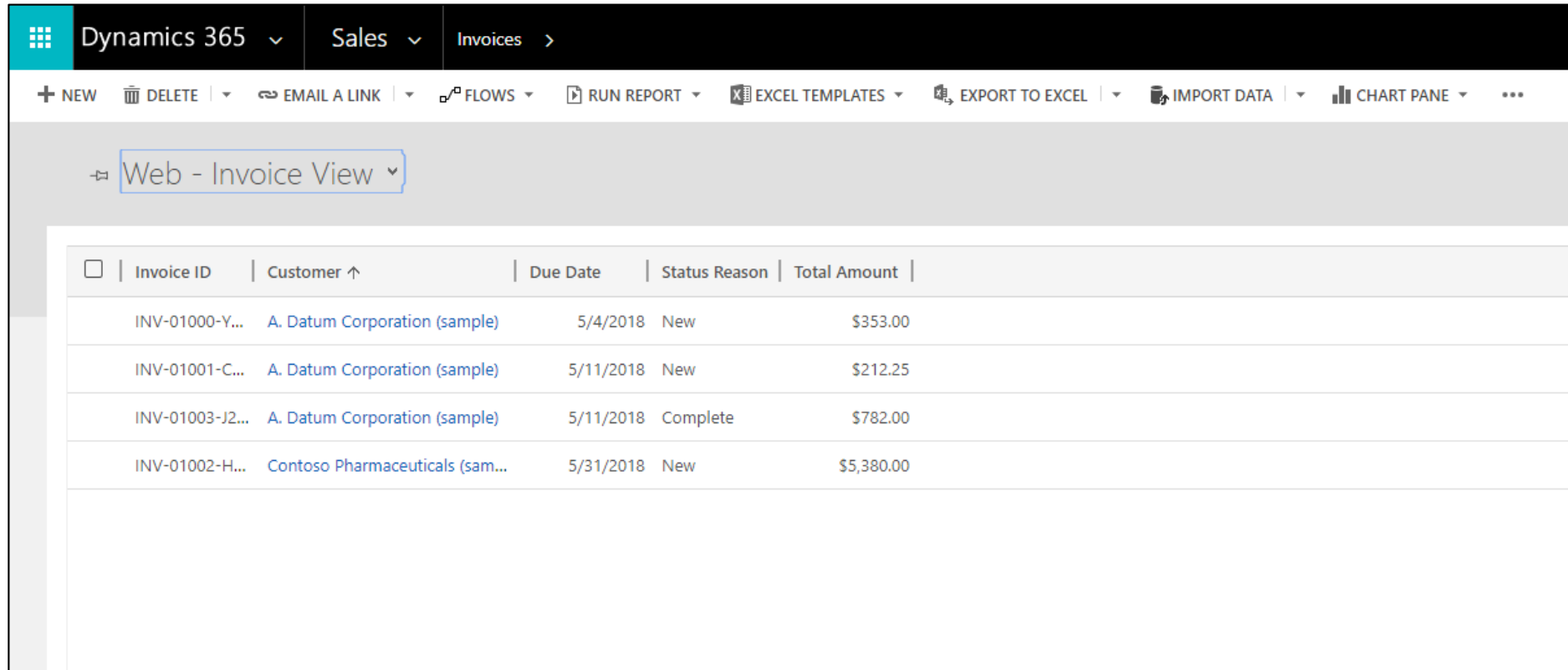
Exchange Rate

Freight Amount

New Field

Introduction to Dynamics 365 Portals

Build – D365 Forms and Views for Portals

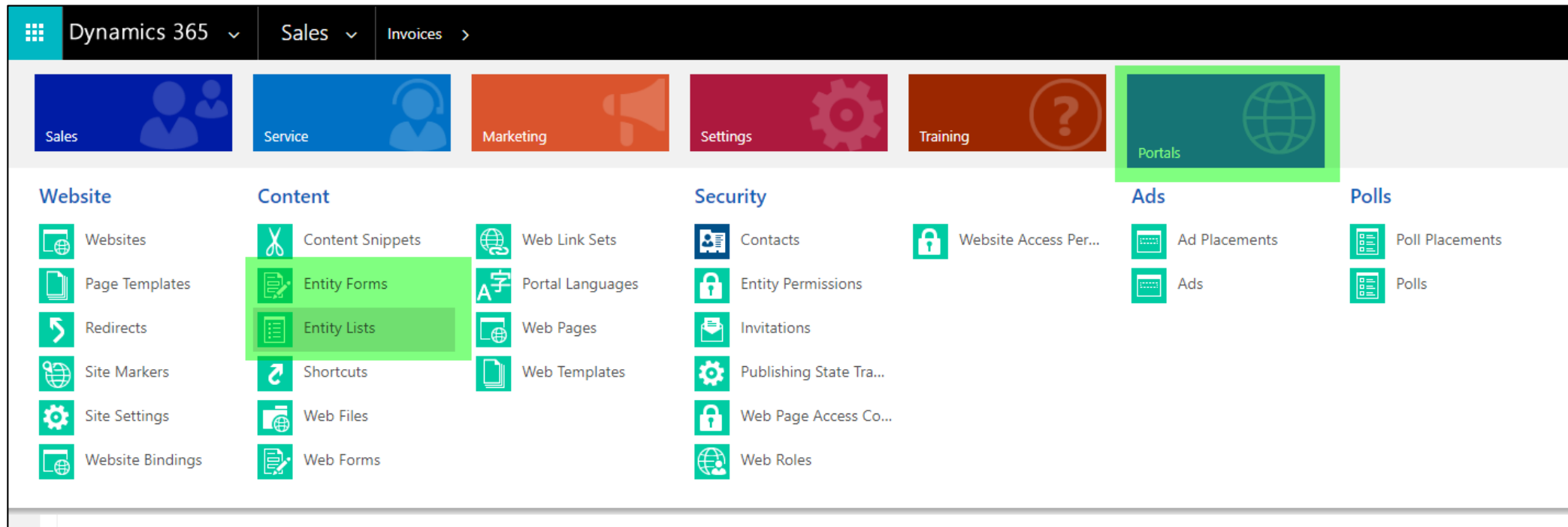


The screenshot displays the Dynamics 365 user interface for the 'Invoices' entity. The top navigation bar shows 'Dynamics 365', 'Sales', and 'Invoices'. Below this, a command bar includes options like '+ NEW', 'DELETE', 'EMAIL A LINK', 'FLOWS', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', and 'CHART PANE'. A view selector dropdown is set to 'Web - Invoice View'. The main content area features a table with the following data:

Invoice ID	Customer ↑	Due Date	Status Reason	Total Amount
INV-01000-Y...	A. Datum Corporation (sample)	5/4/2018	New	\$353.00
INV-01001-C...	A. Datum Corporation (sample)	5/11/2018	New	\$212.25
INV-01003-J2...	A. Datum Corporation (sample)	5/11/2018	Complete	\$782.00
INV-01002-H...	Contoso Pharmaceuticals (sam...	5/31/2018	New	\$5,380.00

Introduction to Dynamics 365 Portals

Build – Portal Entity Lists and Entity Forms



Introduction to Dynamics 365 Portals

Build – Portal Entity Lists and Entity Forms

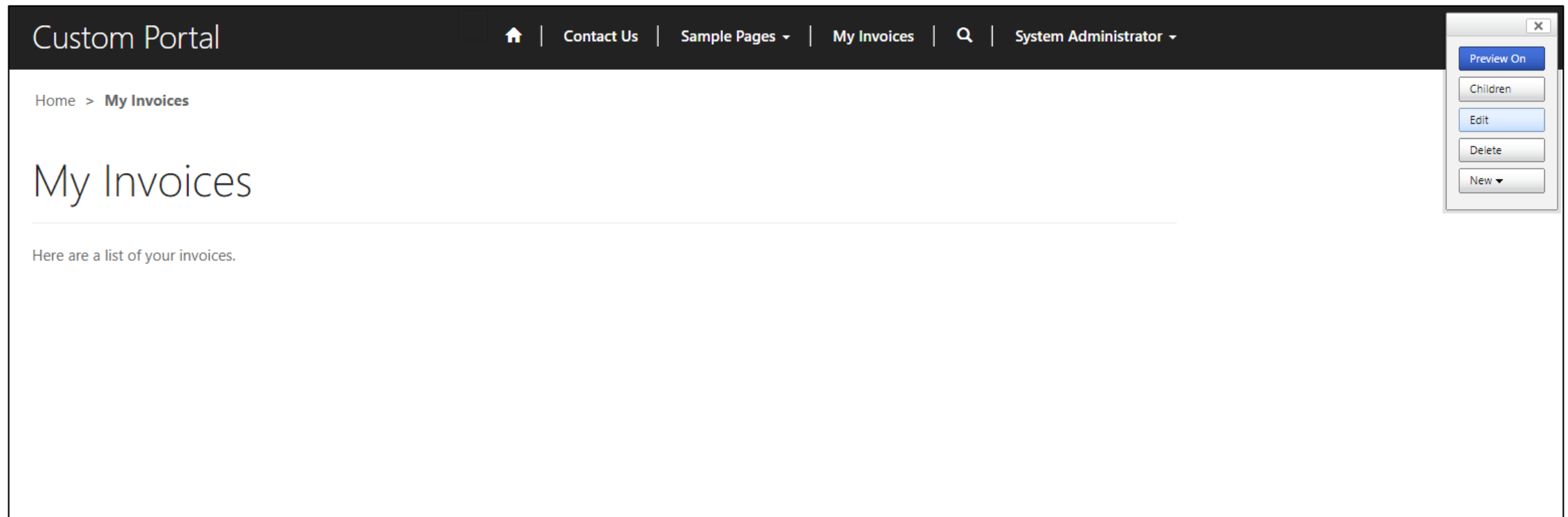
The screenshot shows the 'New Entity List' configuration page in Dynamics 365 Portals. The breadcrumb trail at the top indicates the path: Dynamics 365 > Portals > Entity Lists > New Entity List. The page title is 'ENTITY LIST : INFORMATION' and 'New Entity List'. The left sidebar shows the 'General' tab selected. The main content area contains the following fields:

- Name:** Invoice Entity List
- Entity Name:** invoice (with a lock icon)
- Website:** Custom Portal
- Views:** A section with a 'Views' dropdown and a '+ View' button. Below it, a 'View' dropdown is open, showing a list with the name 'Web - Invoice View'.
- Page Size:** 10
- Web Page for Details View:** A text field with a dotted line placeholder.
- ID Query String Parameter Name:** id
- Details Button Label:** English (1033)

At the bottom right of the 'Views' section, there are links for 'Advanced settings' and 'Refresh View'.

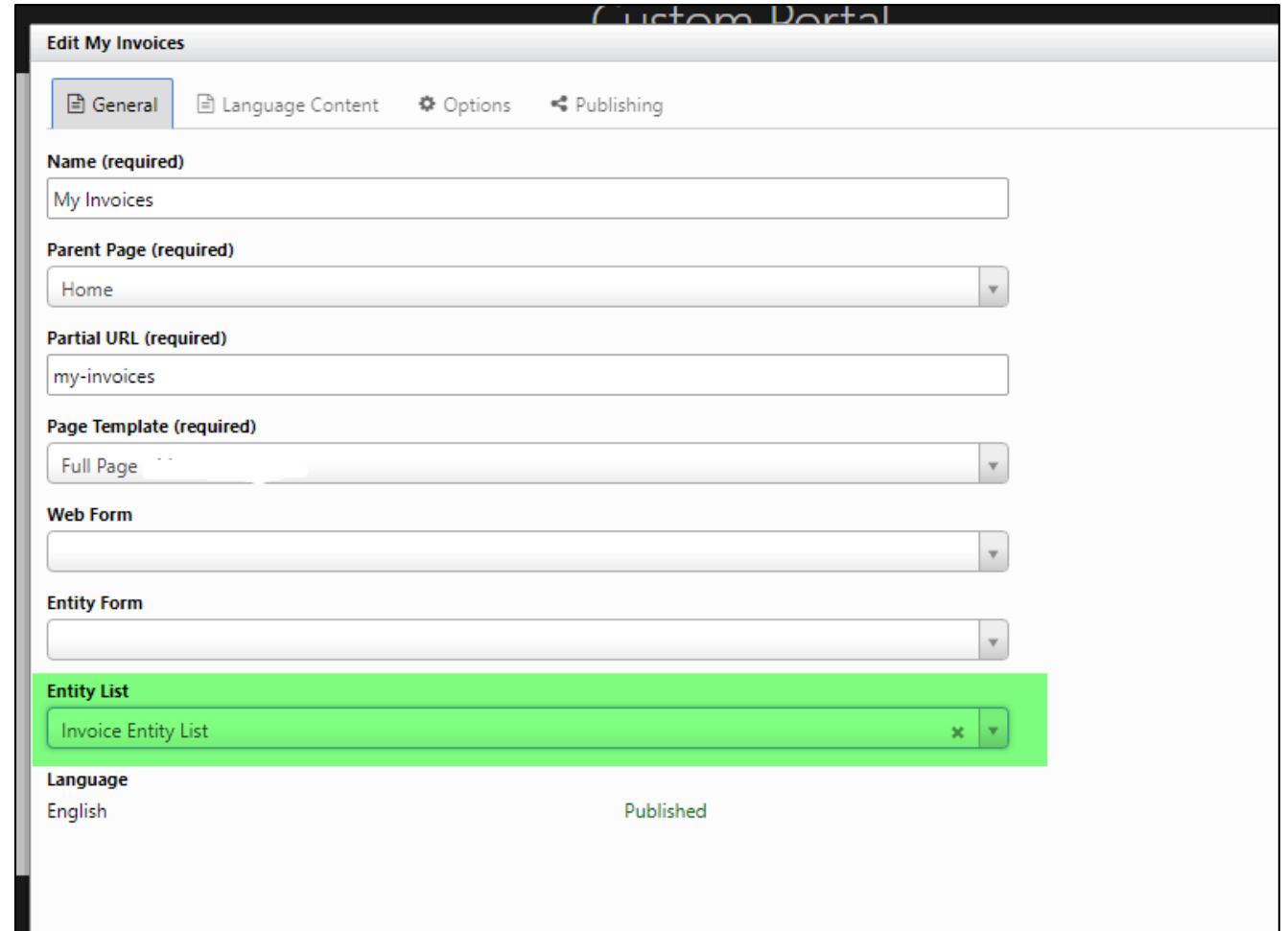
Introduction to Dynamics 365 Portals

Build – Portal Entity Lists and Entity Forms



Introduction to Dynamics 365 Portals

Build – Portal Entity Lists and Entity Forms



The screenshot shows the 'Edit My Invoices' configuration page for a custom portal. The page has a header with tabs: 'General' (selected), 'Language Content', 'Options', and 'Publishing'. The main form contains the following fields:

- Name (required):** Text input with 'My Invoices'.
- Parent Page (required):** Dropdown menu with 'Home' selected.
- Partial URL (required):** Text input with 'my-invoices'.
- Page Template (required):** Dropdown menu with 'Full Page' selected.
- Web Form:** Empty dropdown menu.
- Entity Form:** Empty dropdown menu.
- Entity List:** A green highlighted section with a dropdown menu showing 'Invoice Entity List'.
- Language:** Text input with 'English'.

At the bottom right, the status 'Published' is displayed.

Introduction to Dynamics 365 Portals

Build – Portal Entity Lists and Entity Forms

Custom Portal				
Home Contact Us Sample Pages My Invoices System Administrator				
Home > My Invoices				
My Invoices				
Invoice ID	Customer ↑	Due Date	Status Reason	Total Amount
INV-01000-Y8H2B5	A. Datum Corporation (sample)	5/4/2018	New	\$353.00
INV-01001-C3H6K8	A. Datum Corporation (sample)	5/11/2018	New	\$212.25
INV-01003-J2Q9J7	A. Datum Corporation (sample)	5/11/2018	Complete	\$782.00
INV-01002-H4G2C4	Contoso Pharmaceuticals (sample)	5/31/2018	New	\$5,380.00

Introduction to Dynamics 365 Portals

Build – Filtering

The screenshot displays the 'Invoice Entity List' configuration page in Dynamics 365 Portals. The page is divided into several sections for configuring the entity list.

Entity List: INFORMATION
Invoice Entity List

Filter Conditions

Attribute	Value
Portal User Attribute	
Account Attribute	accountid
Website Attribute	Not Applicable

Metadata Filter

Enabled ☐

Orientation

Apply Button Label: English (1033)



Filters + Text Filter + Attribute Filter Set + Lookup Set + Range Filter Set + Dynamic Picklist Set + Dynamic Lookup Set + FetchXML Filter

[Refresh View](#)

Introduction to Dynamics 365 Portals


Build – Filtering

Custom Portal

 | [Contact Us](#) | [Sample Pages](#) ▾ | [Invoices](#) |  | [Sign In](#)

Home > **Invoices**

Invoices

Invoice ID	Customer 	Due Date	Status Reason	Total Amount
------------	--	----------	---------------	--------------

There are no records to display.

Introduction to Dynamics 365 Portals

Build – Filtering

Custom Portal				
Home Contact Us Sample Pages Invoices Search Susan Burk (sample)				
Home > Invoices				
Invoices				
Invoice ID	Customer ↑	Due Date	Status Reason	Total Amount
INV-01000-Y8H2B5	A. Datum Corporation (sample)	5/4/2018	New	\$353.00
INV-01001-C3H6K8	A. Datum Corporation (sample)	5/11/2018	New	\$212.25
INV-01003-J2Q9J7	A. Datum Corporation (sample)	5/11/2018	Complete	\$782.00

Introduction to Dynamics 365 Portals

Build – Security

The screenshot displays the Dynamics 365 Portals interface for configuring a web role. The breadcrumb trail at the top indicates the path: Dynamics 365 > Portals > Web Roles > Invoice. The main header identifies the current view as 'WEB ROLE : INFORMATION' for the 'Invoice' portal. A toolbar at the top provides various actions: NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, EMAIL A LINK, RUN WORKFLOW, START DIALOG, FLOWS, and a menu icon. The configuration is organized into two main sections: 'General' and 'Administration'. The 'General' section includes fields for Name (set to 'Invoice'), Website (set to 'Custom Portal'), Description (a large text area), Authenticated Users Role (set to 'No'), and Anonymous Users Role (set to 'No'). The 'Administration' section includes the Owner field, which is assigned to 'Nick Doelman'. A 'Notes' section is also visible at the bottom.

WEB ROLE : INFORMATION	
Invoice	
General	
* Name	Invoice
* Website	Custom Portal
Description	
Authenticated Users Role	No
Anonymous Users Role	No
Administration	
* Owner	Nick Doelman
Notes	

Introduction to Dynamics 365 Portals

Build – Security

WEB PAGE ACCESS CONTROL RULE : INFORMATION

View Invoices

General

Name	View Invoices		
Website	Custom Portal		
Web Page	My Invoices		
Right	Restrict Read	Scope	All content
Description	Allow users to view invoice pages		

Publishing States

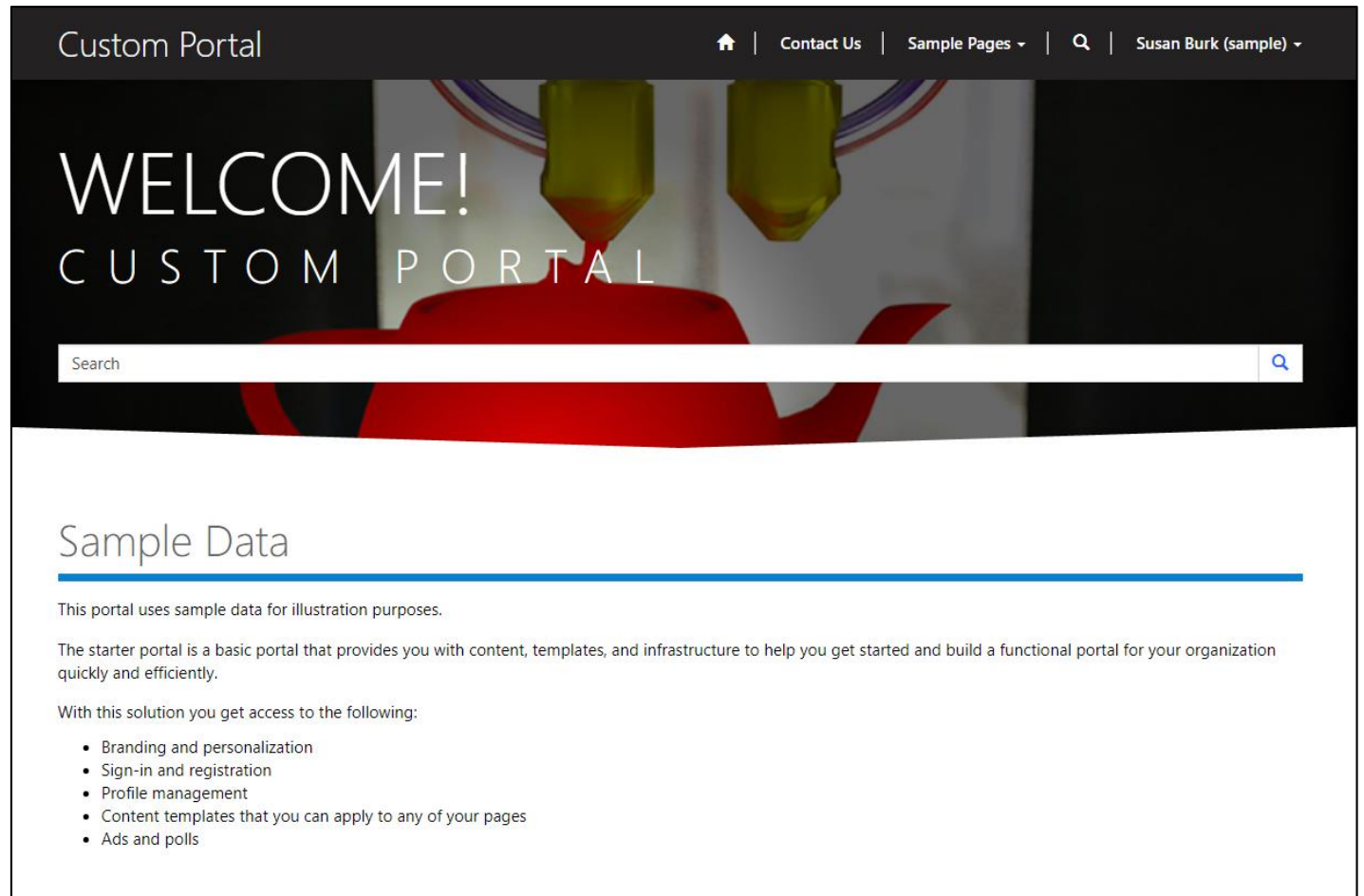
Display Order	Name	Website	Is Default	Select whether...
No Publishing States found for this Web Page Access Control Rule. Select Add (+).				

Web Roles

Name	Website
Invoice	Custom Portal

Introduction to Dynamics 365 Portals

Build – Security



Introduction to Dynamics 365 Portals

Build – Detail Form

The screenshot shows the 'Entity Form : INFORMATION' page in Dynamics 365 Portals. The page is titled 'Invoice Read Entity Form' and is currently on the 'General' tab. The 'General' tab contains the following fields:

- *Name:** Invoice Read Entity Form
- *Entity Name:** invoice (locked field)
- *Form Name:** Web - Invoice Form (dropdown menu)
- Tab Name:** (locked field, dropdown menu)
- Mode:** ReadOnly
- *Record Source Type:** Query String
- *Record ID Query String Parameter Name:** id
- *Website:** Custom Portal

Below the 'General' tab is the 'Form Options' section, which includes:

- Enable Entity Permissions:** (checkbox, currently unchecked)
- Add Captcha:** (checkbox, currently unchecked)
- Show Captcha for Auth:** (checkbox, currently unchecked)

At the bottom of the page is the 'Additional Settings' section, which includes:

- Status:** Active

Introduction to Dynamics 365 Portals

Build – Detail Form

The screenshot shows the Dynamics 365 Portals interface for configuring the 'Invoice Entity List'. The top navigation bar includes 'Dynamics 365', 'Portals', and 'Entity Lists > Invoice Entity List'. Below the navigation bar, there are tabs for 'Grid Configuration' and 'Web Pages'. The 'Grid Configuration' section is active and shows the following configuration:

Grid Configuration [Advanced settings](#) [Refresh View](#)

View Actions [+ Create](#) [+ Download](#)

Item Actions [+ Details](#) [+ Edit](#) [+ Delete](#) [+ Workflow](#) [+ Create Related Record](#)

Details [×](#)

Target Type	Entity Form
Entity Form	Invoice Read Entity Form
Button Label	English (1033)

[Override Column Attributes](#)

Web Pages

Status	Active
Active	

Introduction to Dynamics 365 Portals

Build – Detail Form

The screenshot shows a 'View Details' modal window for an invoice. The background is a dimmed portal page with a breadcrumb 'Home > Invoice', a title 'Invoice', and a list of 'Invoice ID' entries: INV-01000-Y8H2, INV-01001-C3H6, and INV-01003-J2Q9. The modal window contains the following information:

Invoice

Customer *
A. Datum Corporation (sample)

Due Date
5/11/2018

Currency *
Canadian Dollar

Existing Product ↑	Write-In Product	Price Per Unit	Quantity	Extended Amount
	Things	\$3.00	45.00000	\$135.00
	Goop	\$23.75	3.00000	\$71.25
	Crap	\$3.00	2.00000	\$6.00

Total Tax
\$0.00

Total Detail Amount
\$212.25

Total Amount

At the bottom of the modal, there is a footer: 'About Custom... This site uses sam...'. The bottom of the background page also contains a footer: 'Copyright © 2018. All rights reserved.'

Introduction to Dynamics 365 Portals

Next Steps – “Homework”

- **Create Portal Content (Wizard)**
- **Drill down to Web Page instead of Modal Form**
- **Create custom web templates**
- **View on Mobile (responsive design)**
- **Change CSS Themes/Logos/etc.**
- **Explore Entity Permissions for tighter security**
- **Learn Azure B2C for Authentication**
- **Custom Scripting and integration to Azure (Payment Button)**

Introduction to Dynamics 365 Portals

- Want to Learn More
- Microsoft Docs
- Microsoft Learn (Coming soon)
- Portals Jump Start
 - UG Summit EMEA Academy – March 25th & 26th
 - Toronto – May 8th and 9th
 - Online (2019)
- Refresh the Cache Podcast (crm.audio)

Crash Course in Dynamics 365 Portals

Questions?



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January, 26th 2019

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