



NEW ZEALAND



Intro to PowerApps Portals

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Who Am I?

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Intro to PowerApps Portals

Goal Today

- In the next 60 minutes...
- Provision a portal and surface CDS data to an authenticated external user
- LIVE demonstration
- Assume knowledge of Model-Driven Configuration (Entities, Forms, Views, etc)



Intro to PowerApps Portals

DEMO

Intro to PowerApps Portals

- Provision Portal

PowerApps

Environment: classroomportal (org9430c51d)

Your trial environment will expire in 29 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 (preview)
Portal

[All templates →](#)

Recent apps

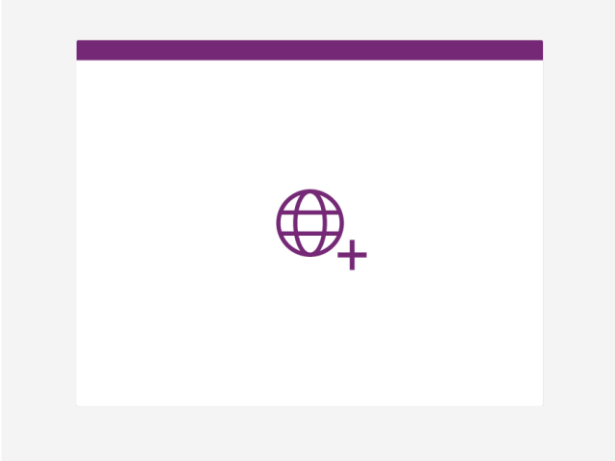
Name	Modified	Owner	Type
Asset Checkout	5 d ago	Nick Doelman	Model-driven
Innovation Challenge	5 d ago	Nick Doelman	Model-driven
Fundraiser	5 d ago	Nick Doelman	Model-driven




Intro to PowerApps Portals

- Provision Portal

Portal from blank (preview)



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

i We'd need to install certain prerequisites. If you'd like to quickly try portals, use an environment with portal package already installed or create a new one using this link.
[Create new environment](#)

Name *

Address * i

✓ [classroomportal.powerappsportals.com](#)

Language

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

Create

Cancel



Intro to PowerApps Portals

The screenshot shows the PowerApps portal interface. The top navigation bar includes the PowerApps logo, the environment name 'classroomportal (org9430c51d)', and various utility icons. A yellow banner at the top right states: 'Your trial environment will expire in 29 days. Convert it to production to keep it. Learn more about trials.' A notification box on the right says: 'Portal provisioning in progress. Your portal classroomportal is currently being provisioned and this can take time. You'll be notified via Notifications pane once it is provisioned.'

The main content area is titled 'Build business apps, fast' and 'Create apps that connect to your data and work across web and mobile. Learn about PowerApps'. Under the heading 'Make your own app', there are three templates: 'Canvas app from blank', 'Model-driven app from blank', and 'Portal from blank (preview)'. The 'Portal from blank (preview)' template is highlighted with a blue border.

Below the templates, there is a link 'All templates →'. Under the heading 'Recent apps', there is a table with the following data:

Name	Modified	Owner	Type
classroomportal	...		Portal
Asset Checkout	5 d ago	Nick Doelman	Model-driven
Innovation Challenge	5 d ago	Nick Doelman	Model-driven



Intro to PowerApps Portals

The screenshot displays the Microsoft PowerApps portal interface. At the top, the header includes the 'PowerApps' logo, the environment name 'classroomportal (org9430c51d)', and various utility icons. A yellow banner below the header states: 'Your trial environment will expire in 29 days. Convert it to production to keep it. Learn more about trials.'

The left sidebar contains navigation links: Home, Learn, Apps, Create, Data, Flows, and Solutions.

The main content area is titled 'Build business apps, fast' and includes the text 'Create apps that connect to your data and work across web and mobile. [Learn about PowerApps](#)'. Below this, the section 'Make your own app' features three templates:

- Canvas app from blank** (Icon: Pencil and plus sign)
- Model-driven app from blank** (Icon: Gear and plus sign)
- Portal from blank (preview)** (Icon: Globe and plus sign)

A link '[All templates](#) →' is located below the templates.

The 'Recent apps' section is divided into 'Recent apps' and 'Shared with me'. It contains a table with the following data:

Name	Modified	Owner	Type
Portal Management	2 min ago	Nick Doelman	Model-driven
Asset Checkout	5 d ago	Nick Doelman	Model-driven
Innovation Challenge	5 d ago	Nick Doelman	Model-driven



Intro to PowerApps Portals

PowerApps

Environment: classroomportal (org9430c51d)

Your trial environment will expire in 29 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 (preview)
Portal

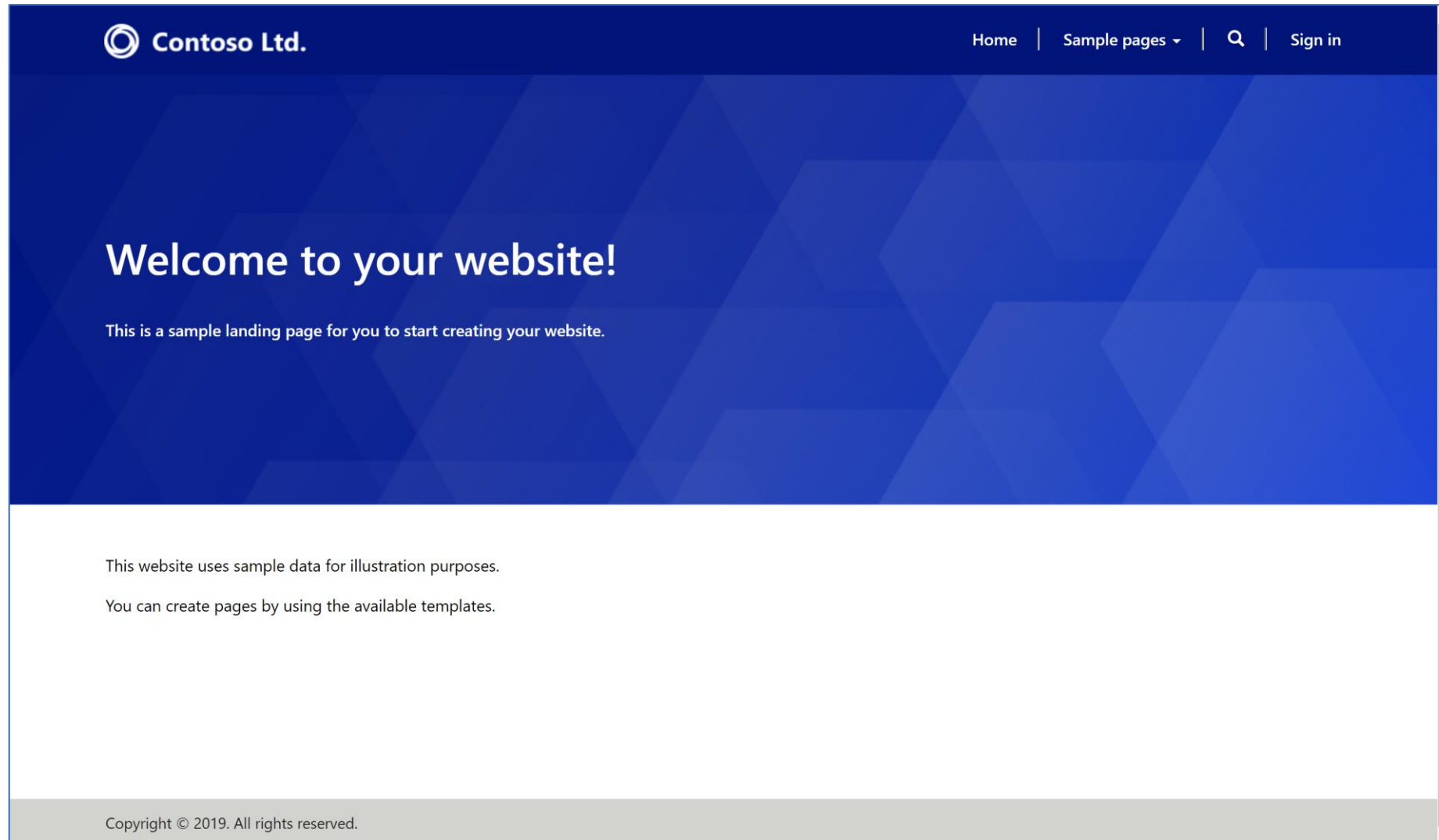
[All templates →](#)

Recent apps

Name	Modified	Owner	Type
classroomportal	1 min ago	Nick Doelman	Portal
Portal Management	12 min ago	Nick Doelman	Model-driven
Asset Checkout	5 d ago	Nick Doelman	Model-driven



Intro to PowerApps Portals



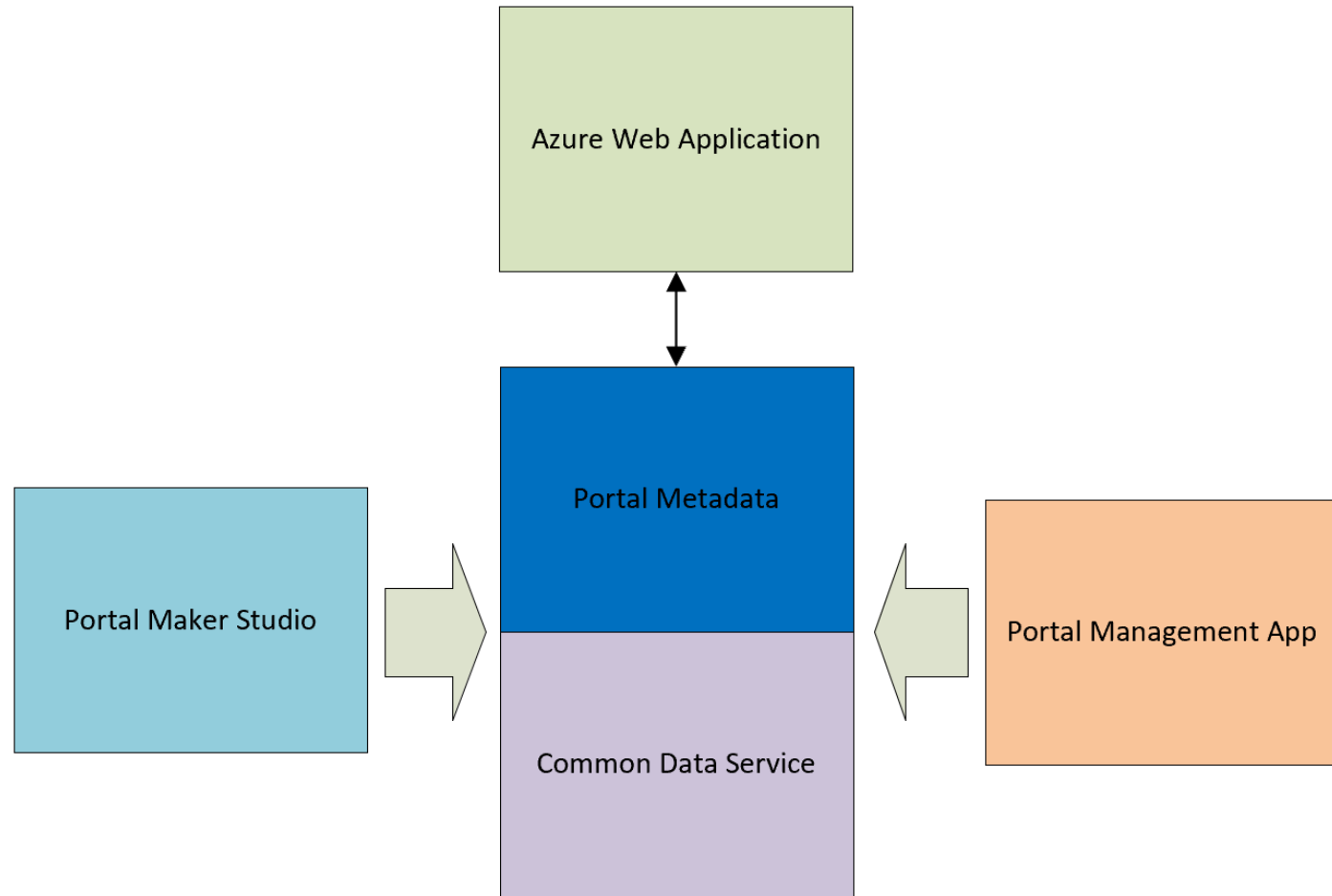
Intro to PowerApps Portals

- Portal Theory



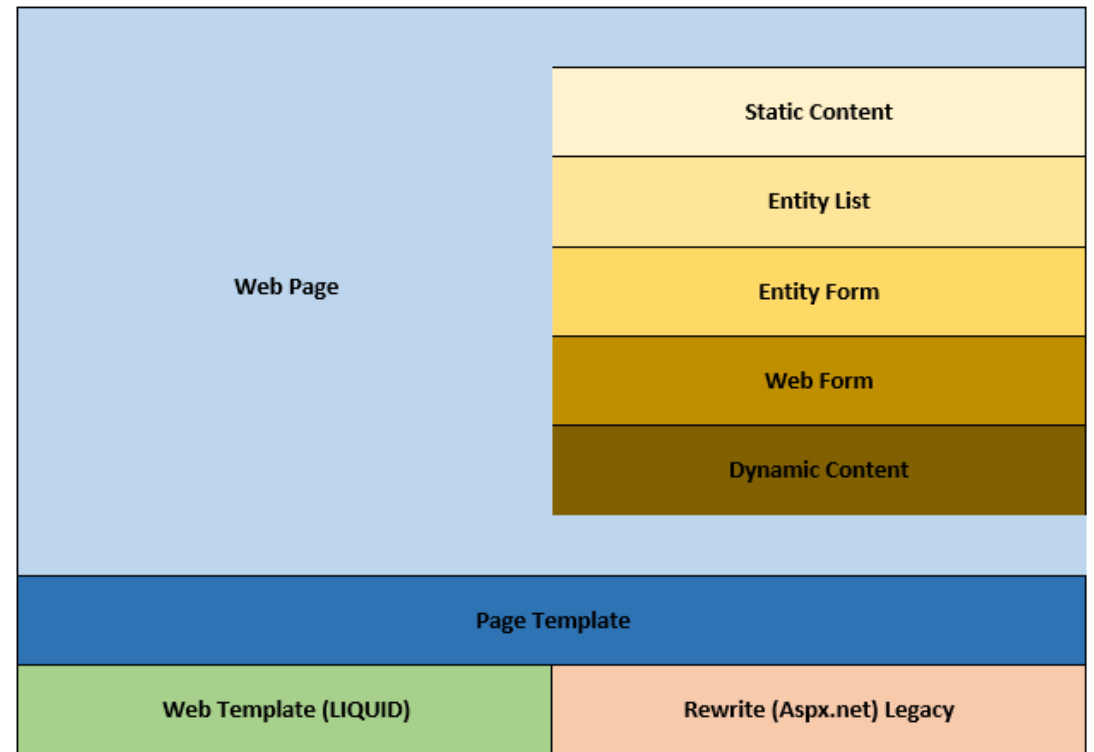
Intro to PowerApps Portals

- Portal components



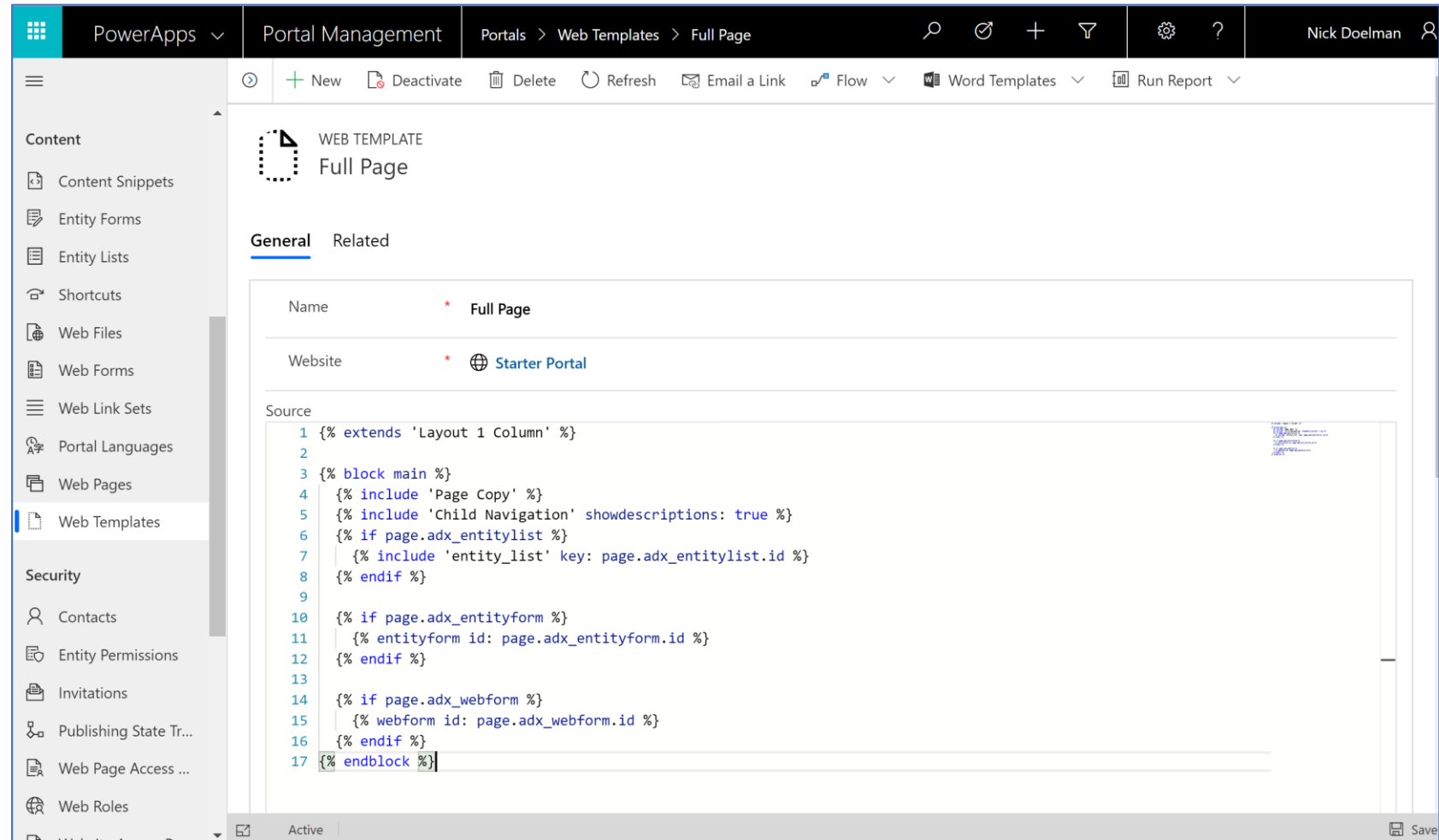
Intro to PowerApps Portals

- Portal structure
- Portal metadata stored in CDS
- Different Portal Components for rendering



Intro to PowerApps Portals

- Preconfigured templates
- Uses Liquid Markup
- Good place to store JavaScript



Intro to PowerApps Portals

```
{% extends 'Layout 1 Column' %}
```

```
{% block main %}
```

```
    {% include 'Page Copy' %}
```

```
    {% include 'Child Navigation' showdescriptions: true %}
```

```
    {% if page.adx_entitylist %}
```

```
        {% include 'entity_list' key: page.adx_entitylist.id %}
```

```
    {% endif %}
```

```
    {% if page.adx_entityform %}
```

```
        {% entityform id: page.adx_entityform.id %}
```

```
    {% endif %}
```

```
    {% if page.adx_webform %}
```

```
        {% webform id: page.adx_webform.id %}
```

```
    {% endif %}
```

```
{% endblock %}
```



Intro to PowerApps Portals

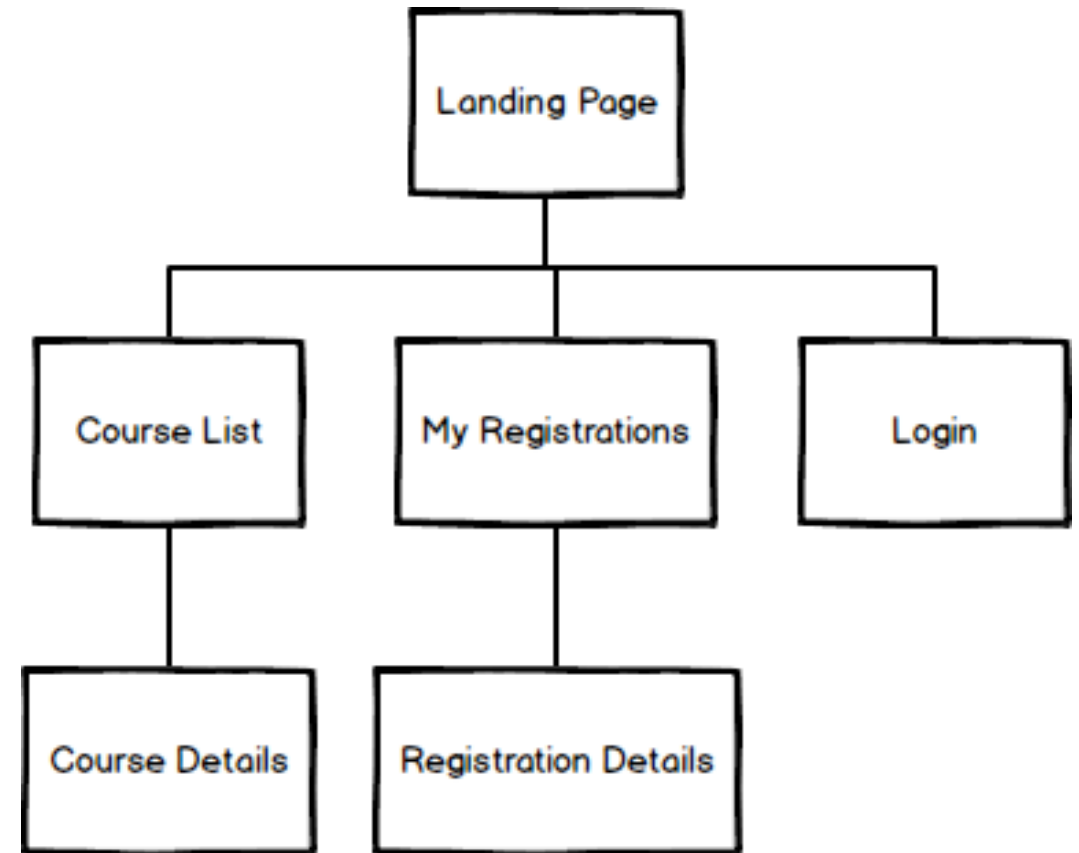
Requirement

- We have a class management model driven app
- We want folks to see class information on a portal
- We want instructors to see all classes they are teaching



Intro to PowerApps Portals

- Design Portal
- Site Map a good place to start
- Consider “Minimal Viable Product”



Intro to PowerApps Portals

Design – Web Pages

Class room

http://classroom.powerappsportals.com

My Registrations


Registration ID	Student	Class	Date
REG-002	Bob Smith	Intro to Portals	2019-8-20
REG-005	Bob Smith	SSRS	2019-6-13
REG-007	Bob Smith	PowerApps	2019-10-16

Class room

http://classroom.powerappsportals.com

REG-002

Course

Start Date 

Student

Fee



Intro to PowerApps Portals

Model Driven App

The screenshot displays the PowerApps interface for a 'Classroom' app. The top navigation bar shows 'PowerApps', 'Class Room App', and 'Classroom > Registrations'. The left sidebar includes 'Home', 'Recent', 'Pinned', and a 'Management' section with 'Courses', 'Classes', and 'Registrations' (selected). The main area shows a table titled 'Active Registrations' with a search bar. The table has columns: 'Registration...', 'Class', 'Student', 'Student Account', 'Registra...', and 'Status R...'. It contains three rows of data. At the bottom, there is an alphabetical index bar and a status bar indicating '1 - 3 of 3 (0 selected)'.

Registration...	Class	Student	Student Account	Registra...	Status R...
REG-01000	Intro to PowerApps Portals-8/1	Maria Campbell (sample)	---	8/9/2019	Registered
REG-01001	SSRS for the PowerApps-8/21/2	Maria Campbell (sample)	---	8/5/2019	Registered
REG-01002	Intro to PowerApps Portals-9/1	Nancy Anderson (sample)	---	8/6/2019	Registered

Intro to PowerApps Portals

Model Driven App

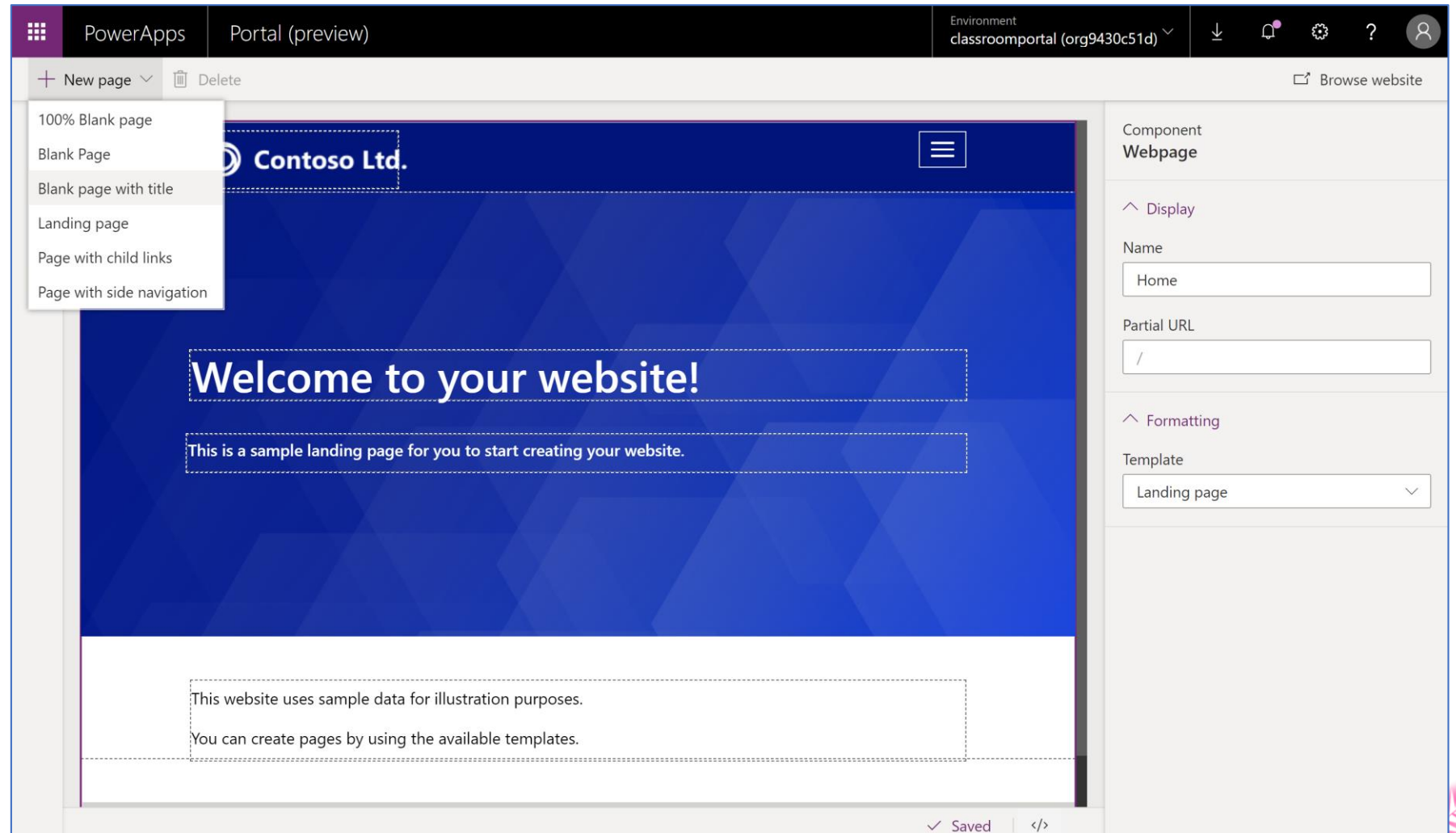
The screenshot displays a PowerApps Portal interface for a 'Class Room App'. The top navigation bar shows the app name and the current path: Classroom > Registrations > REG-01000. A left-hand navigation pane lists options: Home, Recent, Pinned, and a 'Management' section containing Courses, Classes, and Registrations (which is currently selected). The main content area shows the details for 'REGISTRATION REG-01000'. Above the details is a toolbar with actions: New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, and Flow. The details are organized into two tabs: 'General' (active) and 'Related'. The 'General' tab contains a table with the following data:

Class	Intro to Powe...	Registration Number	REG-01000
Registration Date	8/9/2019	Amount Paid	\$1,000.000
Student	Maria Campb...	Student Account	---
		Status Reason	Registered



Intro to PowerApps Portals

Create New Page



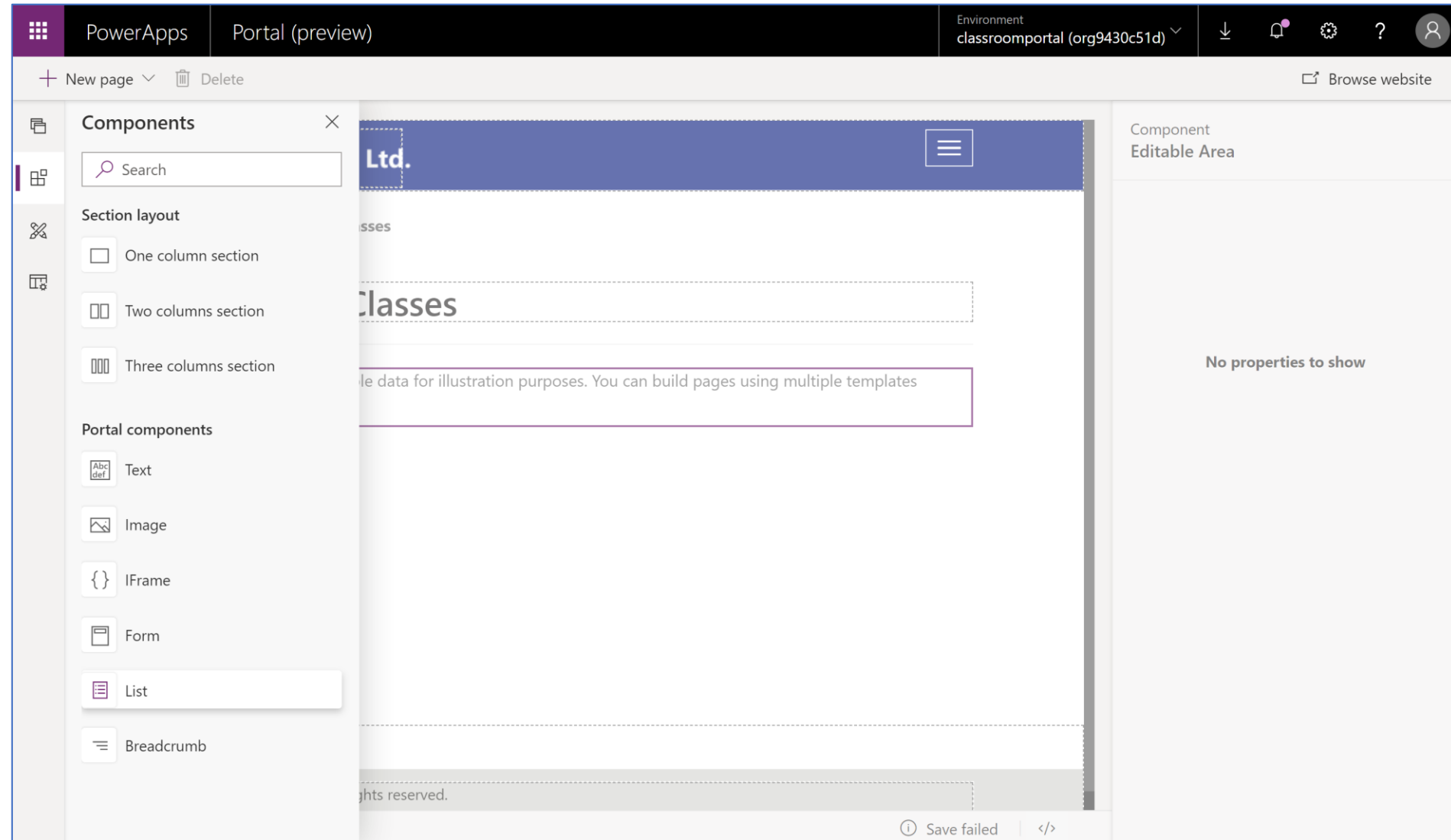
Intro to PowerApps Portals

Edit Page

The screenshot displays the PowerApps Portal editor interface. The top navigation bar includes the PowerApps logo, the text 'Portal (preview)', and the environment 'classroomportal (org9430c51d)'. Below the navigation bar, the main workspace shows a preview of a web page. The page has a dark blue header with the 'Contoso Ltd.' logo and a hamburger menu icon. The main content area has a breadcrumb 'Home > Available Classes' and a title 'Available Classes'. Below the title is a text block: 'This website uses sample data for illustration purposes. You can build pages using multiple templates available.' The footer contains the text 'Copyright © 2019. All rights reserved.' On the right side, the 'Component Webpage' panel is visible, showing the 'Display' section with 'Name' set to 'Available Classes' and 'Partial URL' set to 'classes'. The 'Formatting' section shows the 'Template' set to 'Blank page with title'. At the bottom right, there is a 'Save failed' message and a code icon.

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Add List




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Link List to Model Driven View

The screenshot displays the PowerApps Portal (preview) interface. The top navigation bar includes the PowerApps logo, the text 'Portal (preview)', and the environment 'classroomportal (org9430c51d)'. Below the navigation bar, the main content area shows a page titled 'Available Classes' under the 'Contoso Ltd.' header. The page content includes a heading 'Available Classes', a placeholder text 'This website uses sample data for illustration purposes. You can build pages using multiple templates available.', and a 'List' component with the instruction 'Configure the list using the properties pane'. The right-hand side of the interface features the 'Component List' panel, which includes a 'Display' section with 'Create new' (selected) and 'Use existing' options, a 'Name' field containing 'ClassList', an 'Entity' dropdown set to 'Class (avngr_class)', a 'Views' dropdown set to 'Active Classes', and four toggle switches for 'Create new record', 'View details', 'Edit record', and 'Delete record'. The bottom status bar shows 'Save failed' and a code icon.

Intro to PowerApps Portals

Preview Portal App

 **Contoso Ltd.**

Home | Sample pages ▾ | Available Classes | 🔍 | Sign in

Home > Available Classes

Available Classes

This website uses sample data for illustration purposes. You can build pages using multiple templates available.

Course ↑	Start Date and Time	End Date and Time	Instructor	Status Reason	Latitude	Longitude
Intro to PowerApps Portals	8/12/2019 8:00 AM	8/12/2019 5:00 PM	Jim Glynn (sample)	Scheduled		
Intro to PowerApps Portals	9/16/2019 8:00 AM	9/16/2019 5:00 PM	Jim Glynn (sample)	Scheduled		
SSRS for the PowerApps	8/21/2019 8:00 AM	8/21/2019 5:00 PM	Jim Glynn (sample)	Scheduled		



Intro to PowerApps Portals

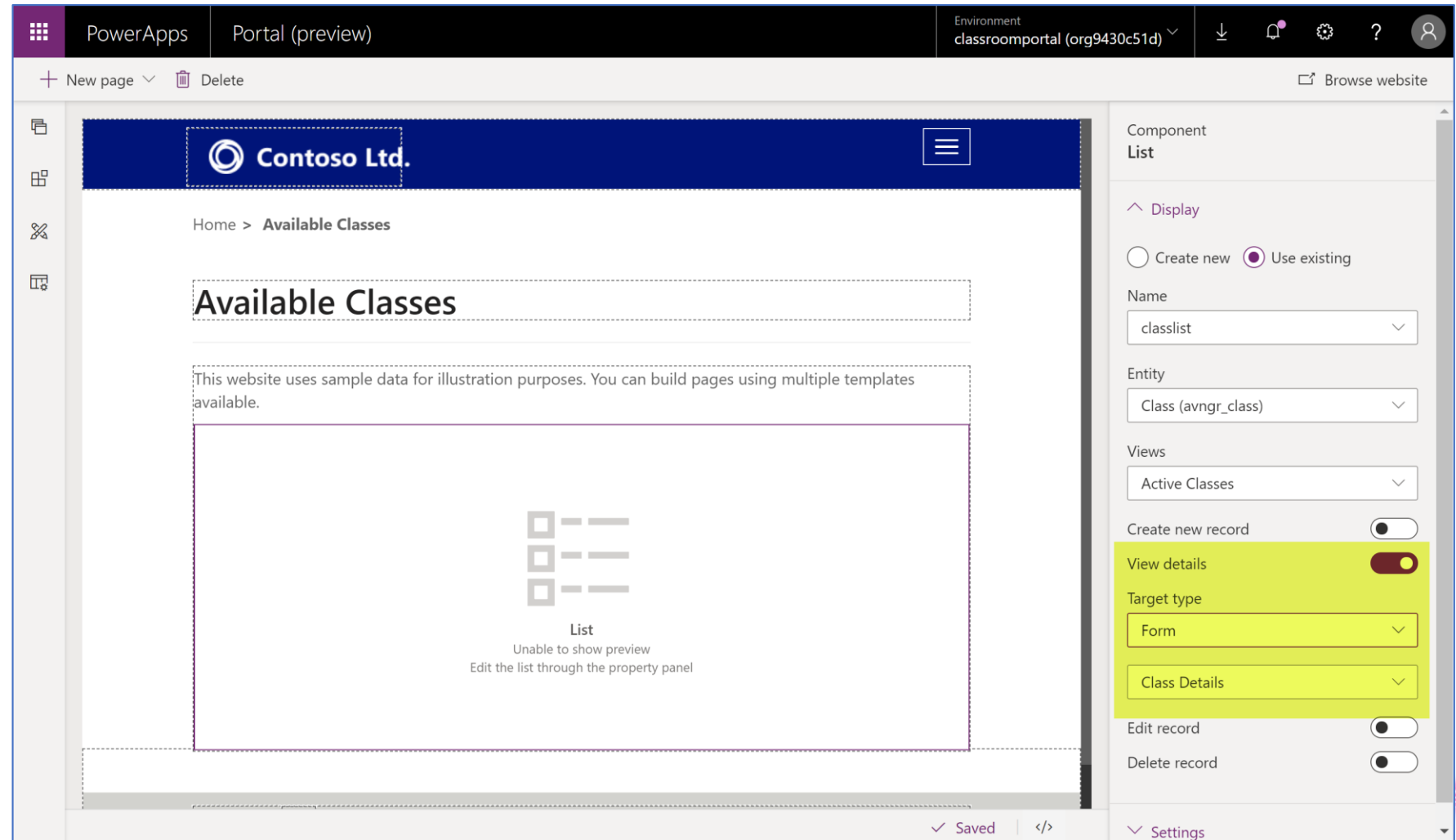
Add Detail Form

The screenshot displays the PowerApps Portal editor interface. The top navigation bar includes the PowerApps logo, the current page title 'Portal (preview)', the environment 'classroomportal (org9430c51d)', and various utility icons. The main workspace shows a preview of a web page with a breadcrumb 'Home > New page > New page' and a heading 'Class Details'. Below the heading is a text block stating: 'This website uses sample data for illustration purposes. You can build pages using multiple templates available.' A large rectangular area is reserved for a 'Form', which is currently in a 'Preview' state with a message: 'Form Unable to show preview Edit the form through the property panel'. The footer of the previewed page contains the text 'Copyright © 2019. All rights reserved.' On the right side, the 'Component Form' property panel is open, showing settings for 'Display' (with 'Use existing' selected), 'Name' (set to 'Class Details'), 'Entity' (set to 'Class (avngr_class)'), 'Form layout' (set to 'Web - Class Details'), and 'Mode' (set to 'ReadOnly'). There are also expandable sections for 'Form success settings' and 'Advanced settings'. The bottom status bar indicates the form is 'Saved'.



Intro to PowerApps Portals

**Edit List Control
to navigate to
form**



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Portal Management App


The screenshot displays the PowerApps Portal Management interface. The left sidebar contains a navigation menu with categories: Entity Forms, Entity Lists (selected), Shortcuts, Web Files, Web Forms, Web Link Sets, Portal Languages, Web Pages, Web Templates, Security (Contacts, Entity Permissions, Invitations, Publishing State Tr..., Web Page Access ...), Web Roles, Website Access Pe..., Ads, and Ad Placements. The main area is titled 'Active Entity Lists' and features a search bar 'Search for records'. Below the search bar is a table with columns: Name, Entity Name, P., Enable Entit..., Sea..., Filte..., Calendar Vi..., Ma..., and O. The table contains two rows: 'classlist' with 'avngr_class' and 'Courselist' with 'avngr_course'. At the bottom, there is a pagination bar showing '1 - 2 of 2 (0 selected)' and a column selector with letters A through Z.

✓	Name	Entity Name	P.	Enable Entit...	Sea...	Filte...	Calendar Vi...	Ma...	O
	classlist	avngr_class	10	No	No	No	No	No	No
	Courselist	avngr_course	10	No	No	No	No	No	No



Intro to PowerApps Portals

Allow users to
login

 Home | Sample pages ▾ | Available Classes ▾ | 🔍 | Jim Glynn (sample) ▾

Home > Available Classes

Available Classes

This website uses sample data for illustration purposes. You can build pages using multiple templates available.

Course ↑	Start Date and Time	End Date and Time	Instructor	Status Reason	Latitude	Longitude
Intro to PowerApps Portals	8/12/2019 8:00 AM	8/12/2019 5:00 PM	Jim Glynn (sample)	Scheduled		▼
SSRS for the PowerApps	8/21/2019 8:00 AM	8/21/2019 5:00 PM	Jim Glynn (sample)	Scheduled		▼



PowerApps Portals



Licensing of PowerApps Portals :

User Type	Licensing	SKU Name	Unit Capacity	Price/month	Comments
External user – Authenticated	Per log in	PowerApps Portals login capacity add-on	100 log ins	\$200	A log in provides an external authenticated user access to a single PowerApps portal for up to 24 hours
External user – Unauthenticated	Per page view	PowerApps Portals page view capacity add-on	100K page views	\$100	
Internal user	Via USL	<ul style="list-style-type: none">• Various Dynamics 365 SKUs• PowerApps per app plan• PowerApps per user plan	NA	NA	Custom portal use rights are aligned with custom app use rights

- Customers can provision a PowerApps portal instance
- No need to purchase separate¹ license

¹\$500 per month per Dynamics 365 Additional Portal instance as of July 2019



Intro to PowerApps Portals

Next Steps – “Homework”

- Provide feedback! <https://experience.dynamics.com/insider>
- Create Portal Content (Wizard in Portal Management App)
- Create custom web templates
- View on Mobile (responsive design)
- Change CSS Themes/Logos/etc.
- Explore Entity Permissions for tighter security
- Azure B2C for Authentication
- Custom Scripting and integration to Azure (Payment Button)
- Subscribe to crm.audio “Refresh the Cache” podcast



Crash Course in Dynamics 365 Portals

Learning Resources

- MS Learn

<https://docs.microsoft.com/en-us/learn/paths/extend-dynamics-365-portals/>

<https://docs.microsoft.com/en-us/learn/paths/work-with-portals-in-dynamics-365/>

<https://docs.microsoft.com/en-us/learn/paths/get-started-dynamics-365-portals/>

- Portals Masterclass (this week)
- Online Learning (working on it!)



Thank you

