Power Apps Portals

Supplemental Module 4: Power Apps Portals

Hands-on Lab Step-by-Step

August 2020

Contents

Power Apps Portals

Lab Prerequisites

This is the sixth lab in a seven-part series covering Power Apps, CDS, Power Automate, Power BI, Power Virtual Agents, and Power Apps Portals. The assumption is that you have successfully completed the first four modules.

If you have not completed the previous modules, you can use the completed version of the lab package in the "\Completed\Module4\Completed Solution" folder. Follow the instructions in the document "Complete Solution" before proceeding with this module, which will provision the app and the CDS entity into your environment.

Power Apps Portals

Power Apps Portals Power Apps makers can now create a powerful new type of experience: external-facing websites that allow users outside their organizations to sign in with a wide variety of identities, create and view data in CDS, or even browse content anonymously. The full capabilities of Dynamics 365 Portals, previously offered only as an add-on to model-driven apps in Dynamics 365, are now available completely standalone inside of Power Apps.

Exercise 1: Create form

In this exercise, you will provision the portal and create a new form for the Device Order entity.
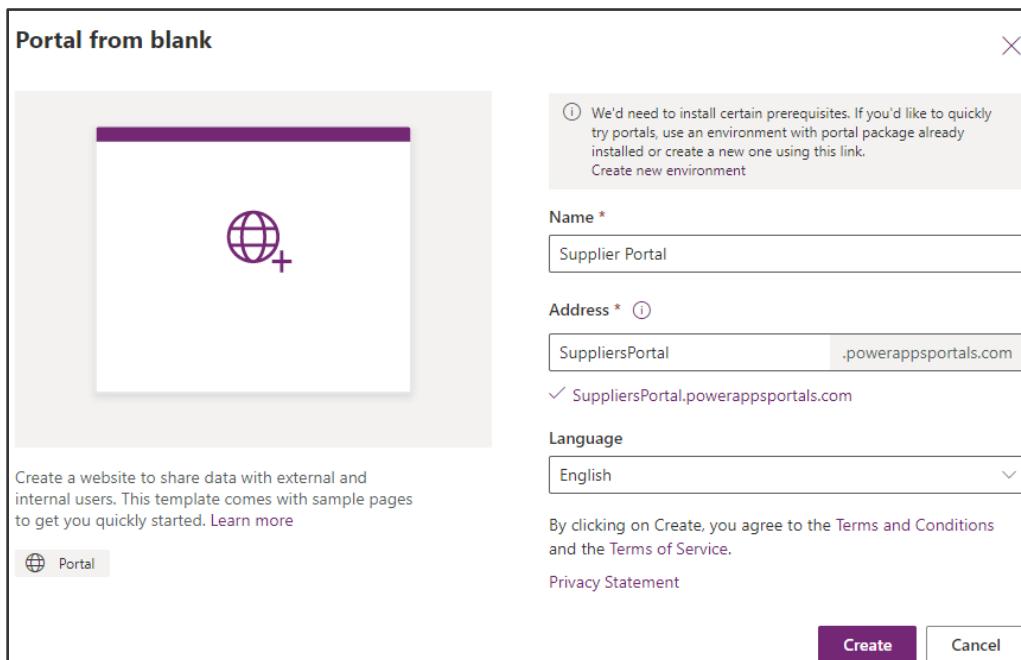
Task 1: Provision portal

Note: The provisioning process for a portal takes several minutes. Your only action at this point is to get it started. The provisioning will take place in the background while you build out the business card reader in your app. If you do not plan to complete the portal app part of this lab, skip ahead to the next task.

1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
2. Select **Apps**.
3. Click **+ New App** and select **Portal**.
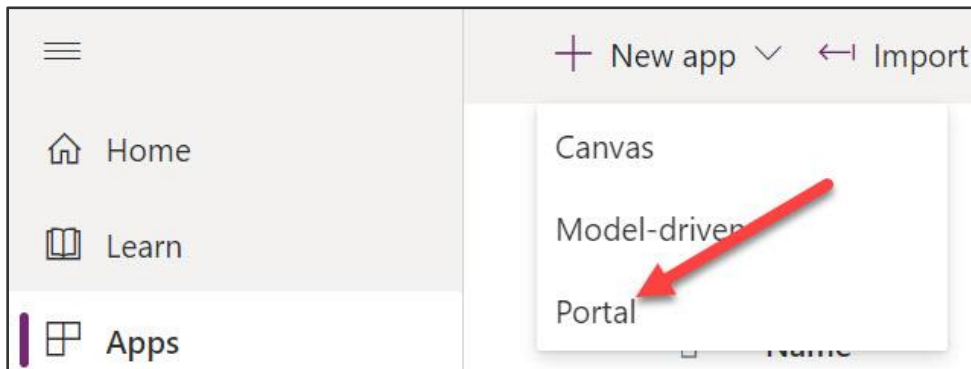
4. Enter **Supplier Portal** for **Name**, provide a unique name for **Address**, and click **Create**.
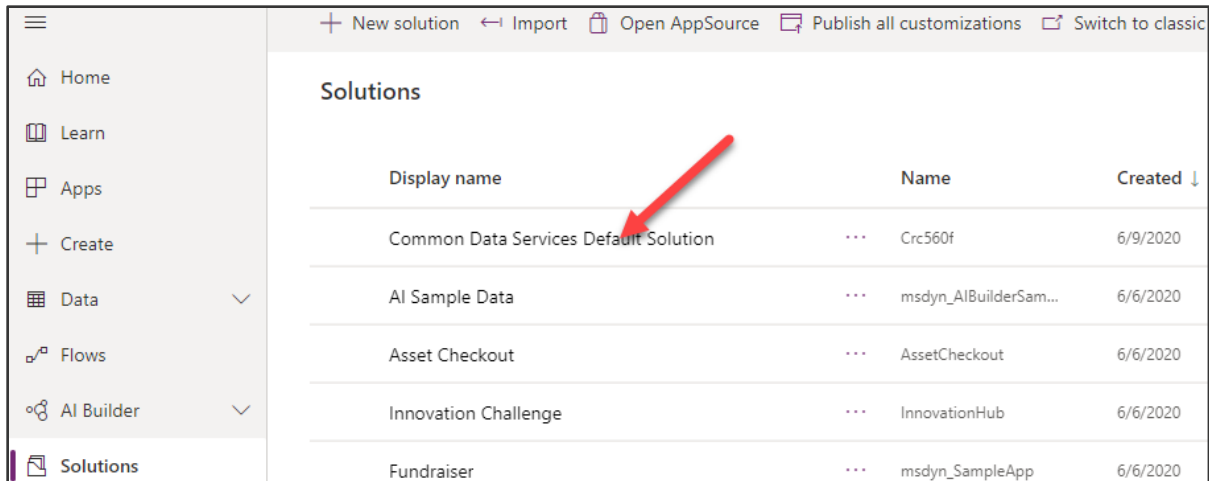
5. The portal will provision in the background while you completed the remaining tasks.

Task 2: Create form

In this task, you will create a new main form that will be used in the portal.

1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
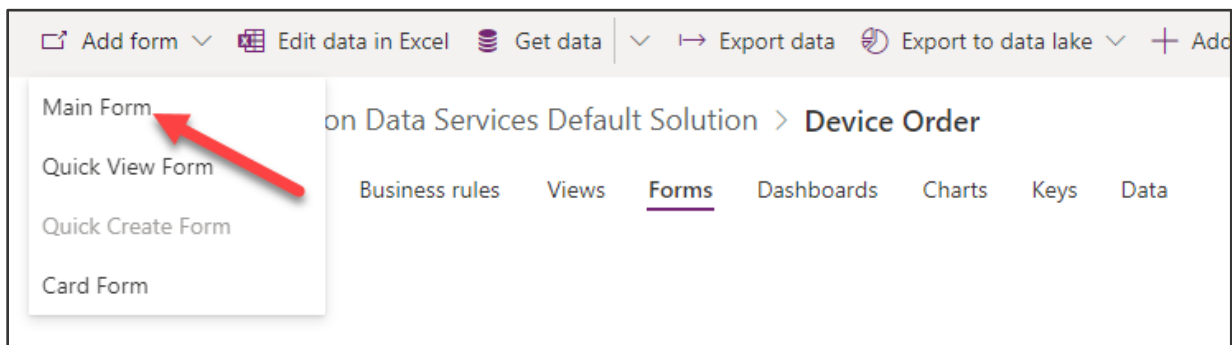2. Select **Solutions** and click to open the **CDS Default Solution**.

3. Locate and click to open the **Device Order** entity.

4. Select the **Forms** tab, click **Add Form**, and select **Main Form**.

5.   Select the **Timeline** control and **Delete**.
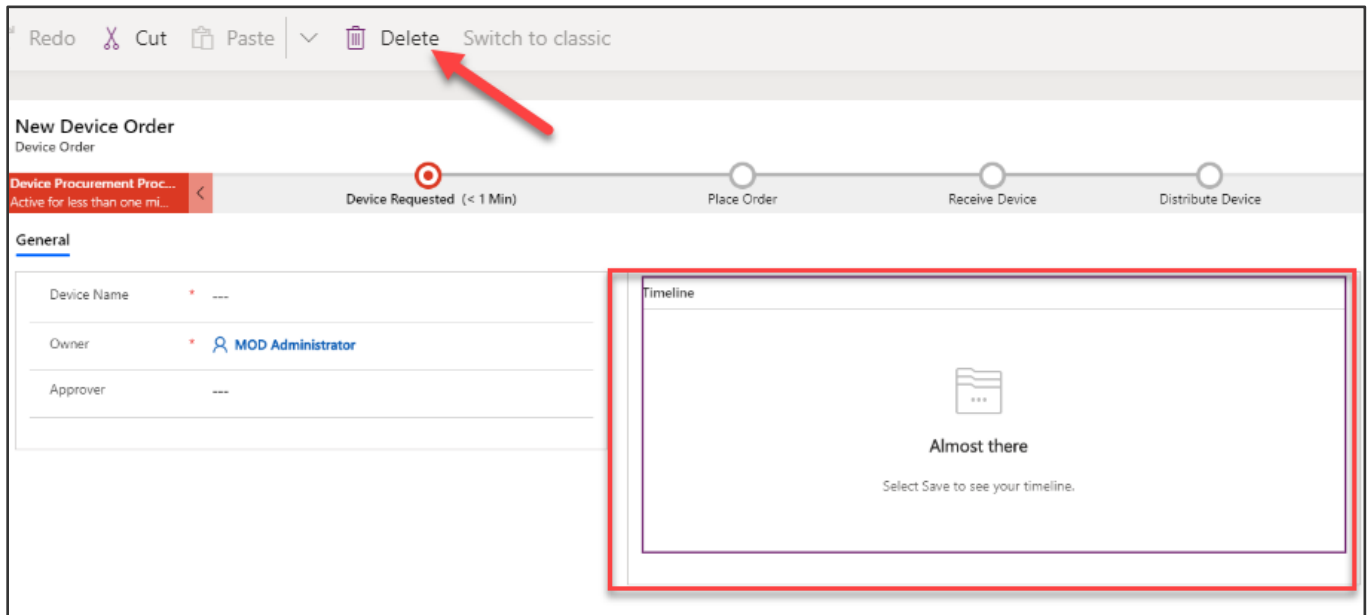
6.   Select the **General** tab and click to expand the **Format** section.
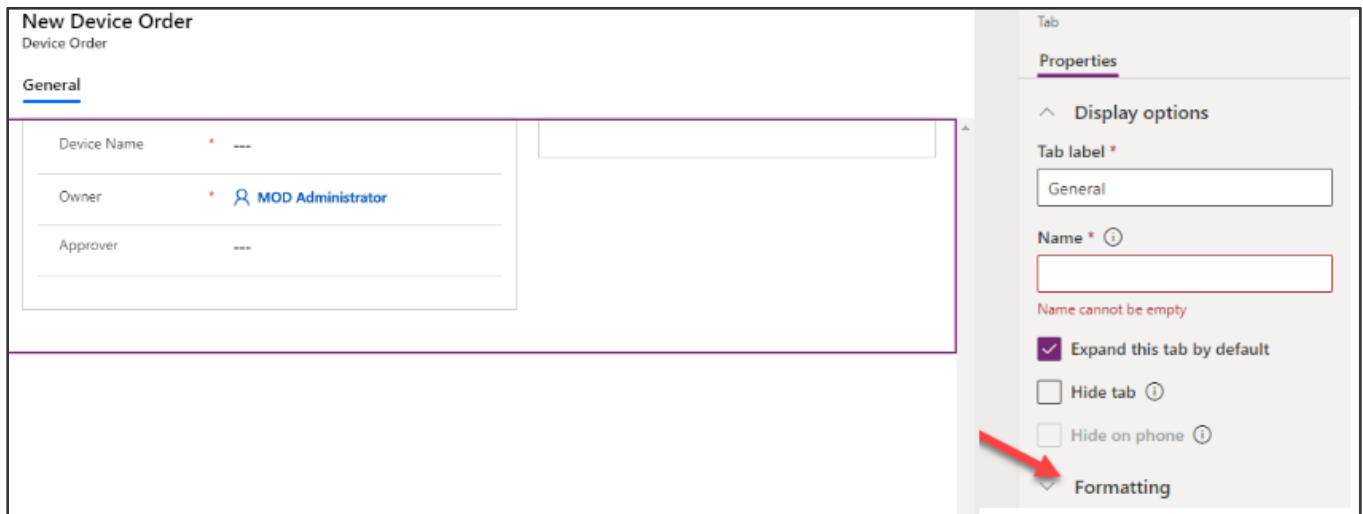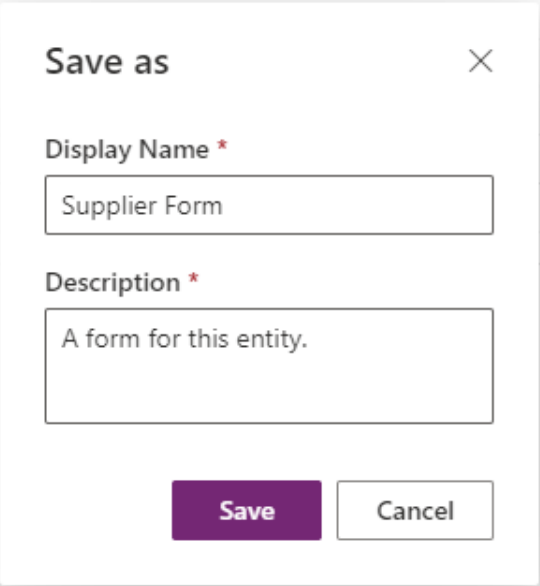

7.   Select **1 column** for **Layout**.
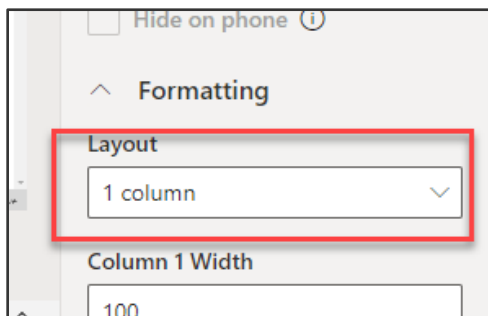
8. Add **Price**, **Comments**, **Supplier Order ID**, and **Estimated Ship Date** fields to the form. Move the **Approver** field below Comments and make sure the **Owner** field is on the bottom of the form by dragging and dropping them into place.

9. Select the **Device Name** field and check the **Read-only field** checkbox.

10. Make the **Price**, **Comments**, and **Approver** fields Read-only.
11. Your form should now look like the image below. Click the chevron button next to Save and select **Save as**

12. Enter **Supplier Form** for **Display Name** and click **Save**.

13. Click **Publish** and wait for the publishing to complete.
14. Close the form editor browser window or tab.

Task 3: Create entity form

In this task, you create a new entity form that will use the supplier form you created.

1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
2. Select **Apps**. The Supplier Portal and Portal Management apps should now be ready.
3. Click to open the **Portal Management** applications.
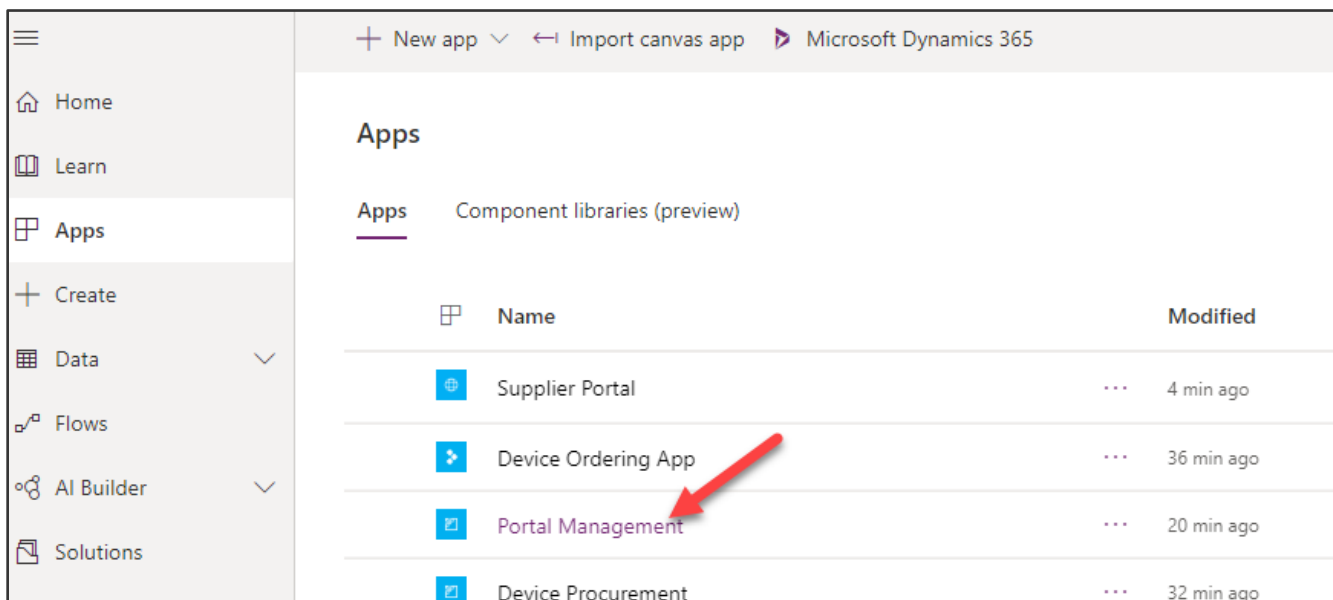
4. Select **Entity Forms** and click **+ New**.
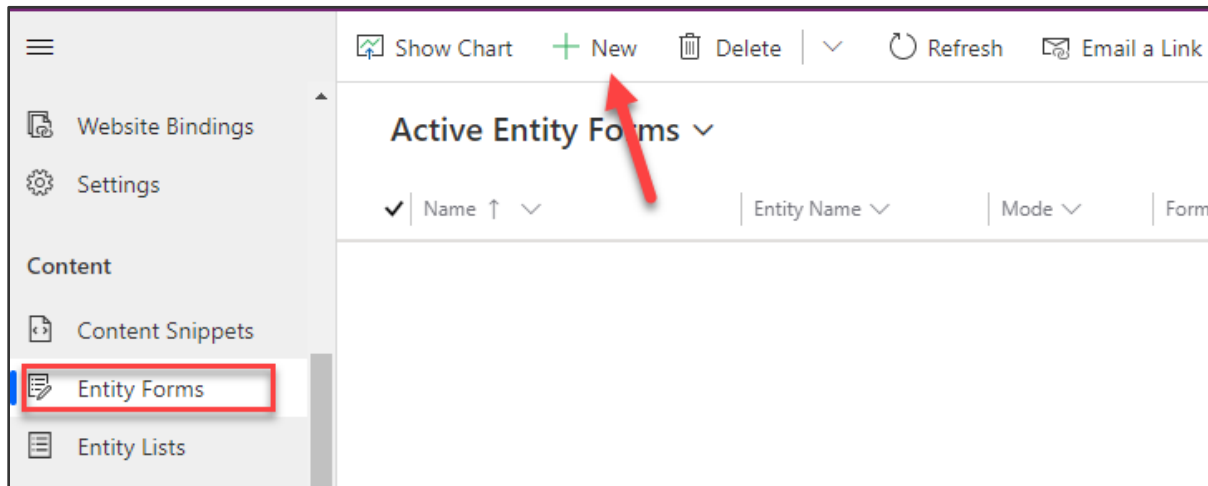
5. Enter **Supplier Portal Form** for **Name**, select **Device Order** for **Entity Name**, **Supplier Form** for **Form Name**, **General** for **Tab Name**, **Edit** for **Mode**, **Query String** for **Record Source Type**, **Starter Portal** for **Website**, and click **Save**.

6. Close the **Portal Management** application.

Exercise 2: Personalize portal

In this exercise, you will edit the home portal web page, create a new page that will show device orders, and use the form you created to edit device order records.

Task 1: Edit home page

1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
2. Select **Apps**, select the **Supplier Portal** application, and click **Edit**.
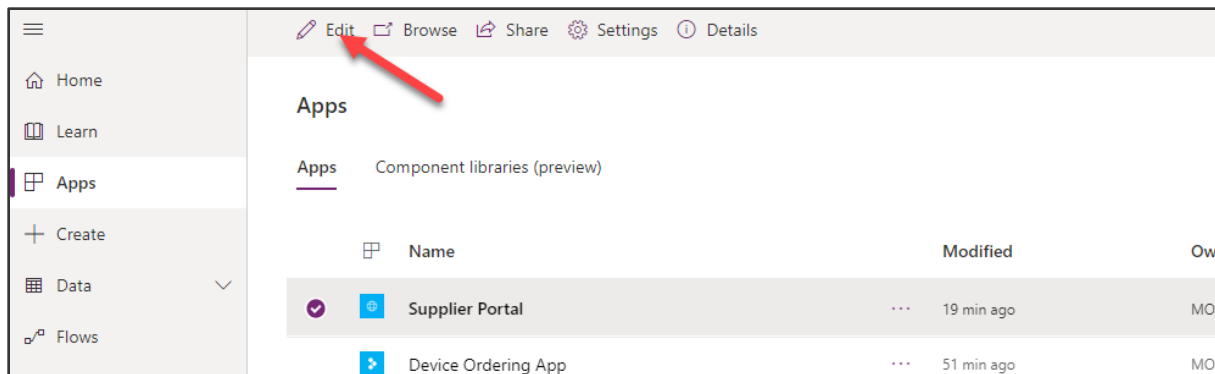
3. Replace the Build your website text with **Contoso supplier portal**.
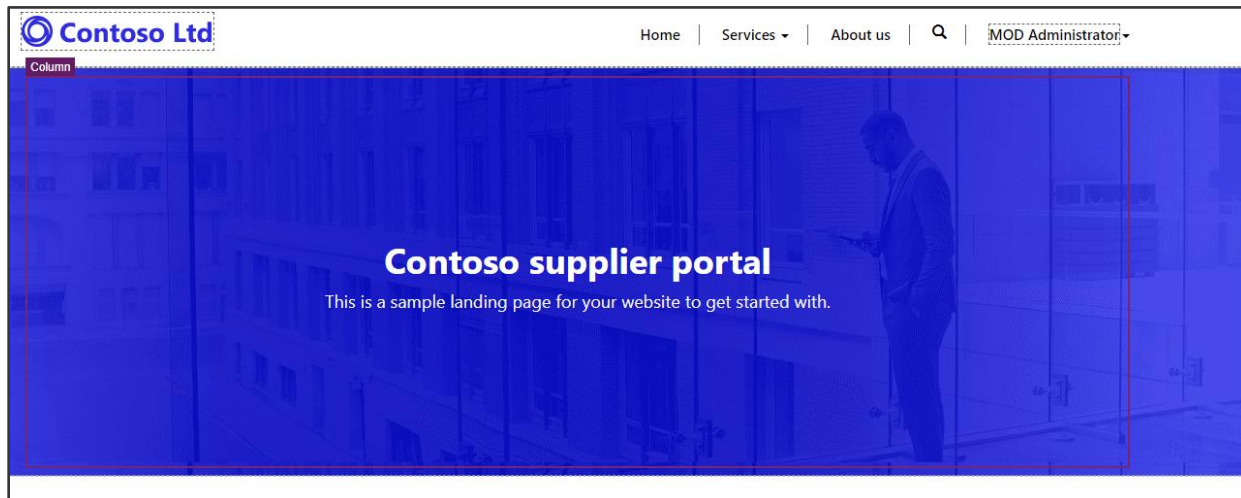
4. Replace the sample text with Welcome to our new supplier portal.

5. You may replace or remove other sample components.
6. Click on a different component to initiate save.
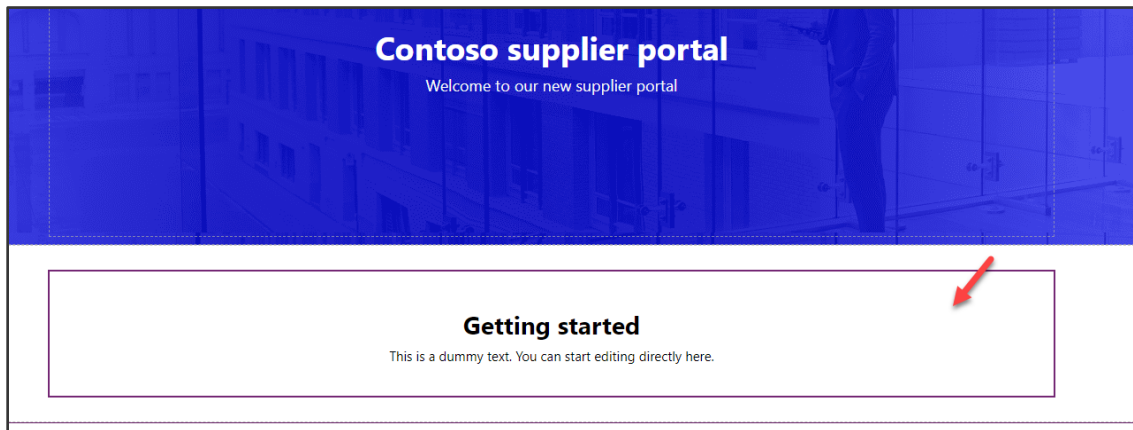
7. Do not navigate away from this page.

Task 2: Create new web page

In this task, you create a new page that will show list of device orders.

1. Click **Pages**.
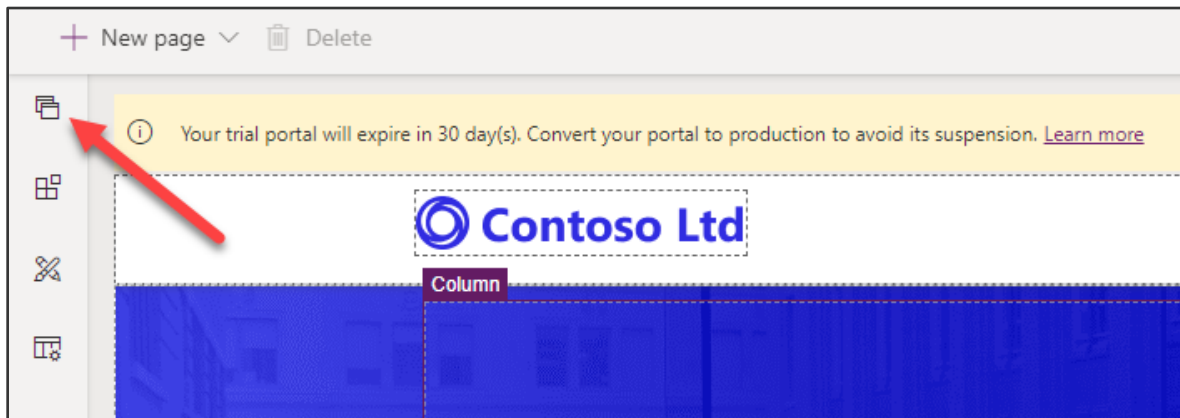
2. Click on the **…** button of the **Home** page and select **Add a child page**.
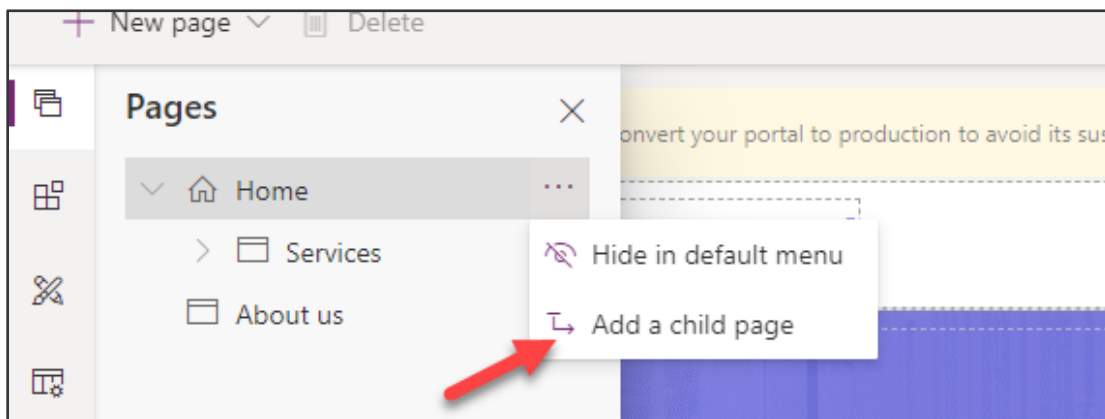
3. Enter **Device Orders** for **Name** and **device-orders** for **Partial URL**.
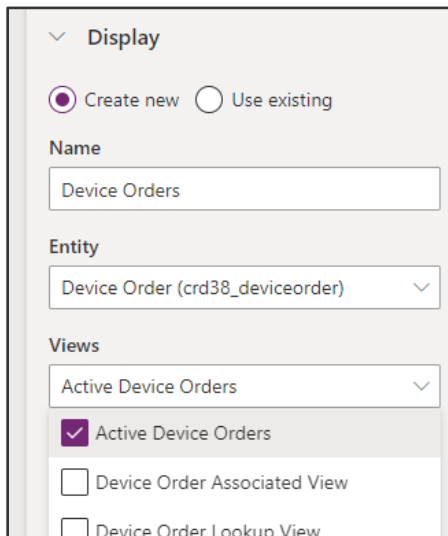
4. Select the place holder text and delete it.
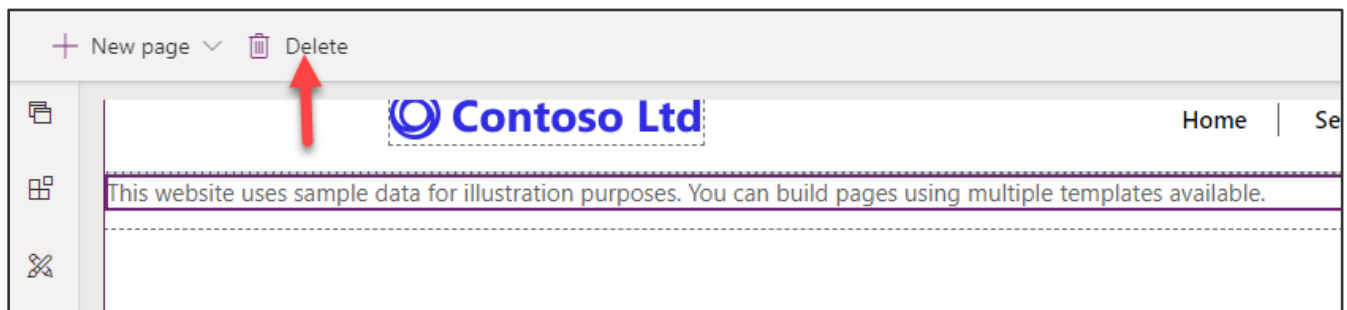
5. Expand **Components** and select **List**.
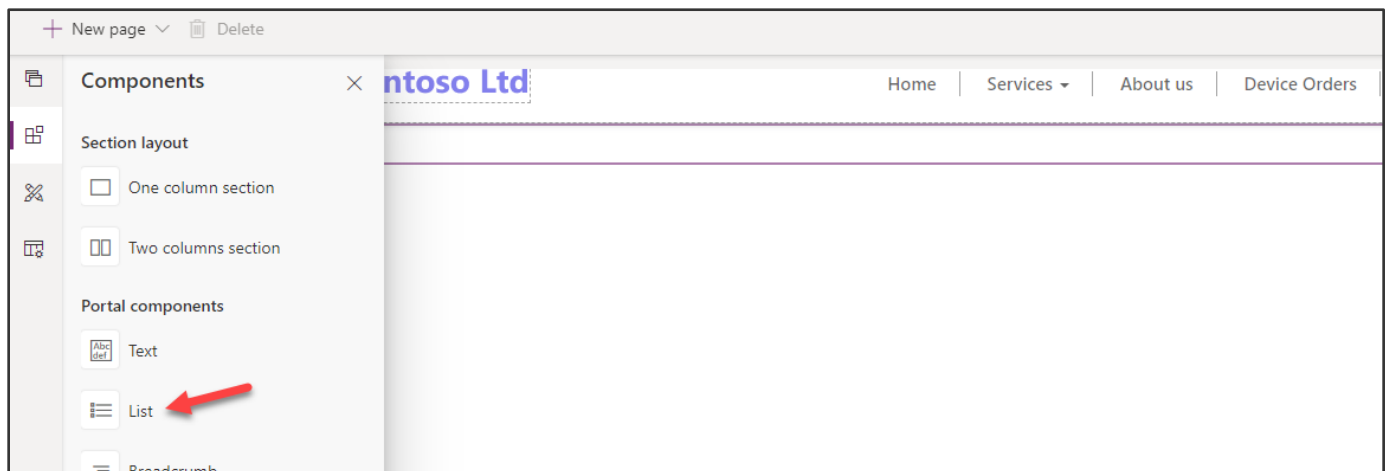
6. Enter **Device Orders** for **Name**, select **Device Order** for **Entity**, and select **Active Device Orders** for **Views**.
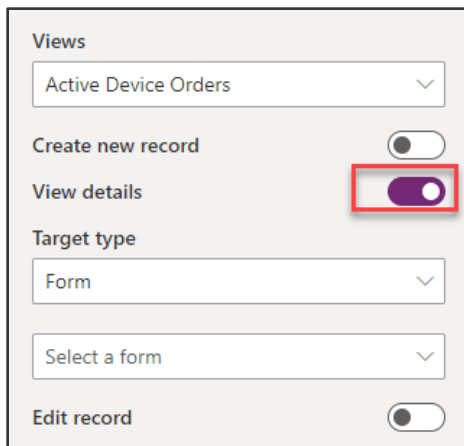
7. Turn on **View details**.
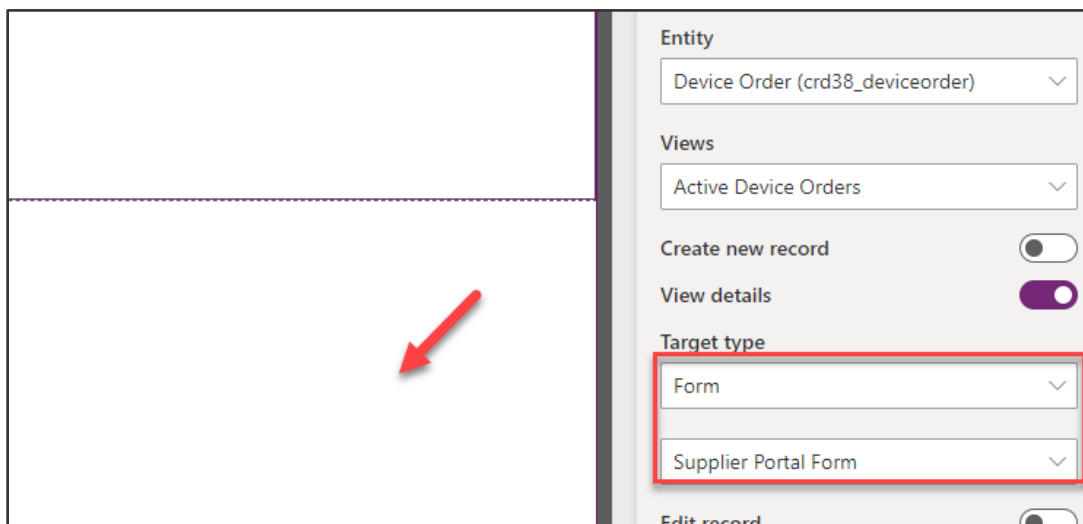
8. Select **Form** for **Target type**, select **Supplier Portal Form**, and click on the canvas to initiate save.

9. Your new page should now look like the image below (this may take a few moments to load). Click **Pages**.
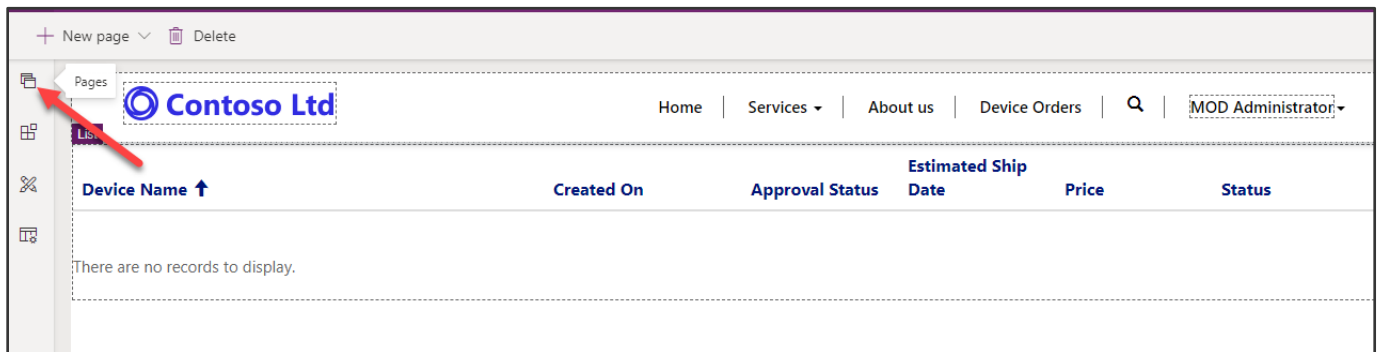
10. Select the **Home** page.
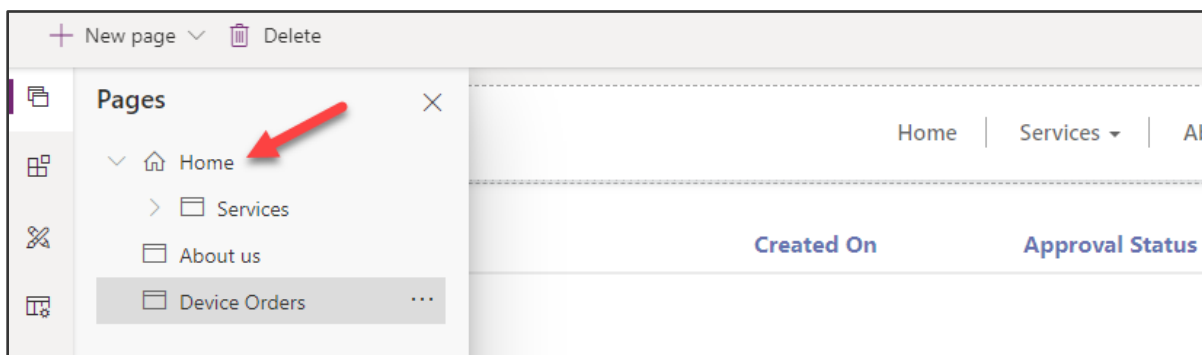
11. Click **Browse website**.
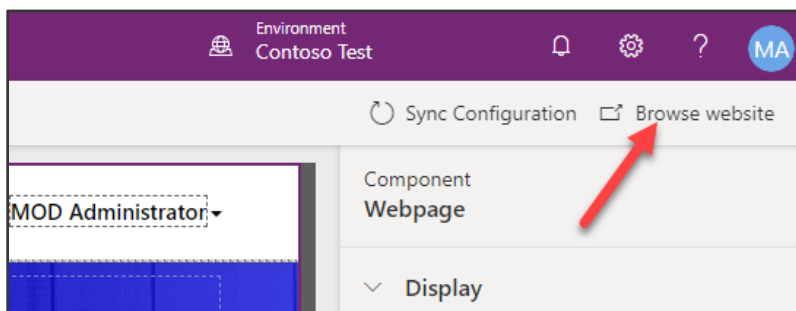
12. The home page should load, and you should see **Device Orders** on the sitemap. Click **Device Orders**.
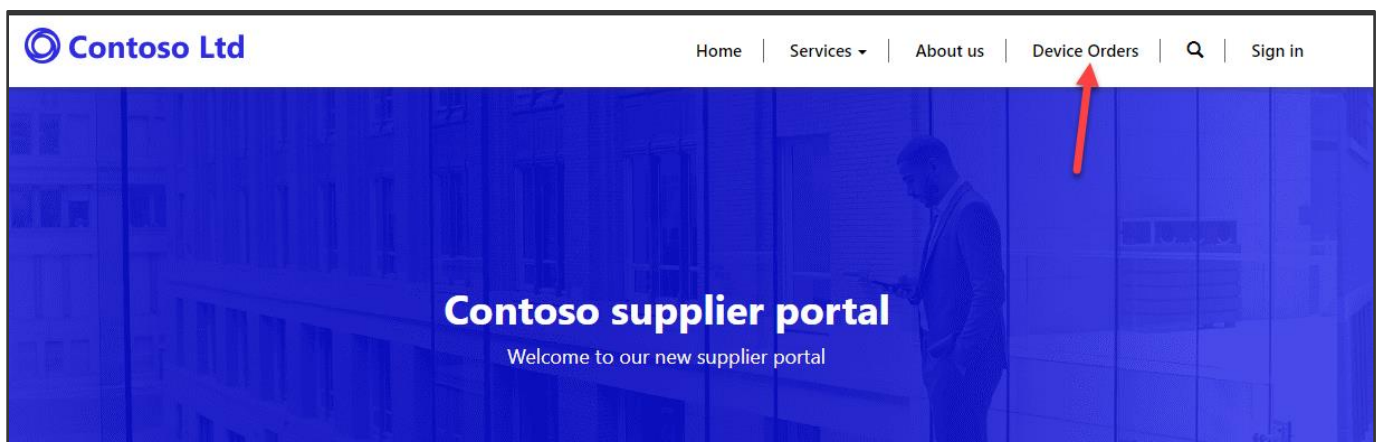
13. The active device orders view should load. Click to open one of the device orders.

14. Your record should open in edit mode and only the **Supplier Order ID** and **Estimated Ship Date** should be editable.

15. Provide **Supplier Order ID**, **Estimated Ship Date**, and click **Submit**.

16. Record should be update and the form should close.

17. Close the preview browser window or tab.
18. Close portal editor browser window or tab.

Exercise 2: Restrict anonymous users

In this exercise, you will restrict anonymous users from seeing the device orders page.

Task 1: Create web page access control rule

In this task, you will create a web page access control rule that will restrict anonymous users from accessing the device orders web page.
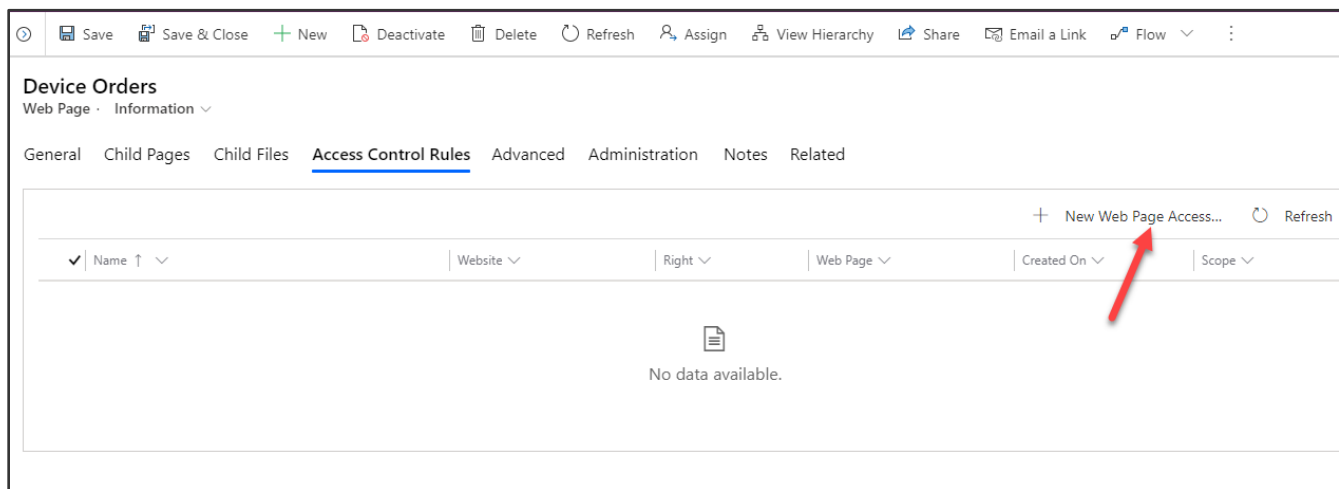
1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Portal Management** application.
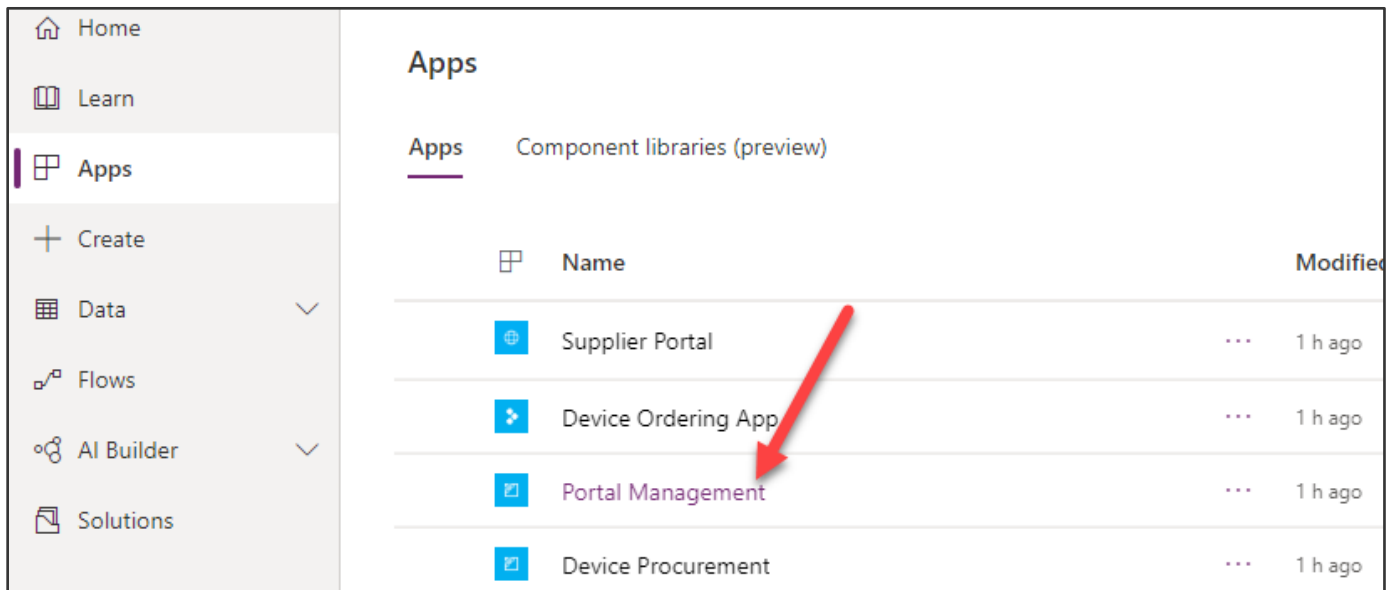
3. Select **Web Pages** and click to open **Device Orders**.
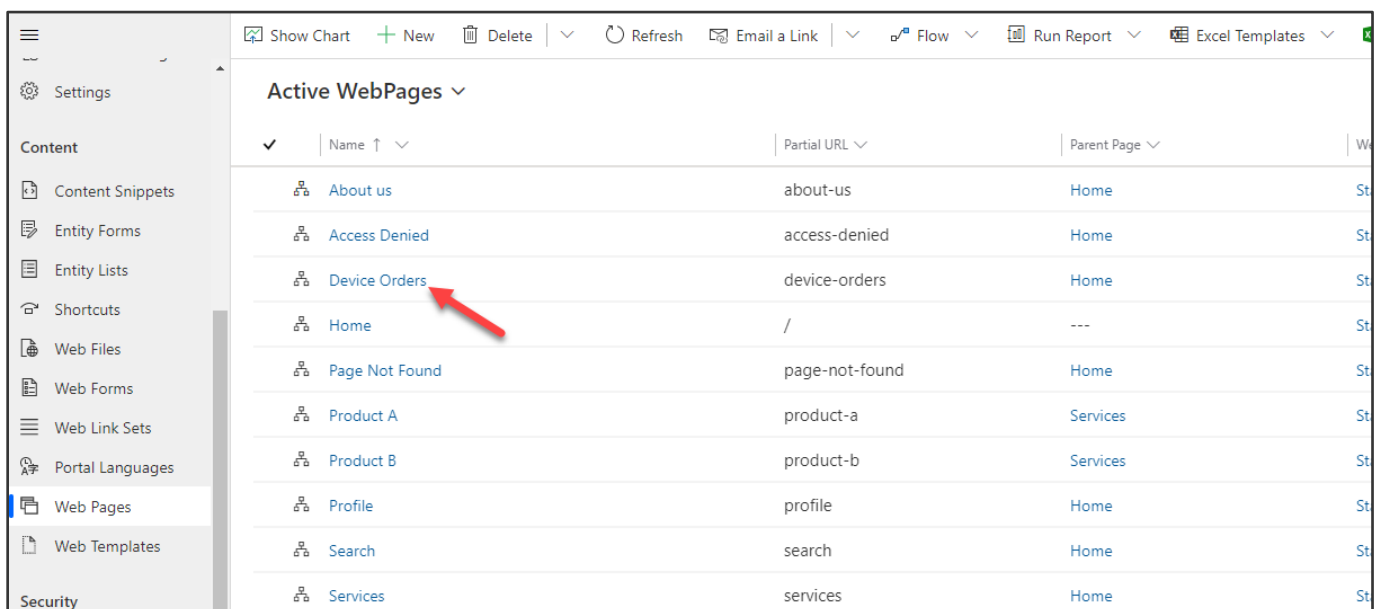
4. Select the **Access Control Rule** tab and click **+ New Web Page Access Control Rule**.

5. Enter **Restrict to authenticated users** for **Name**, select **Starter Portal** for **Website**, select **Restrict Read** for **Right**, and click **Save**.
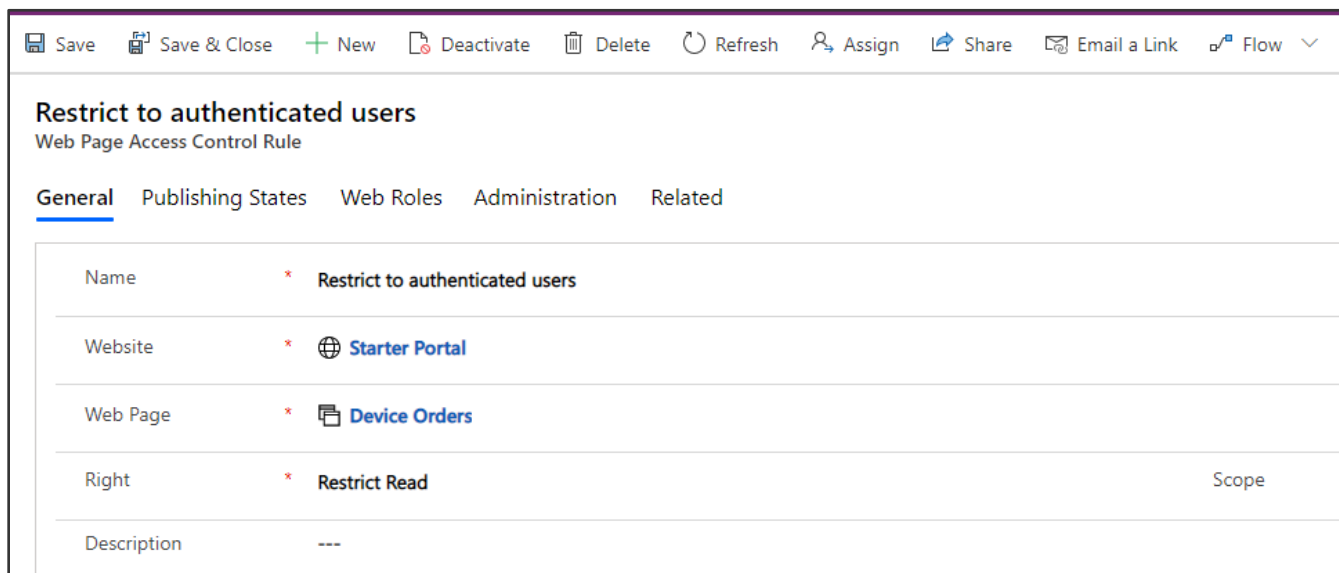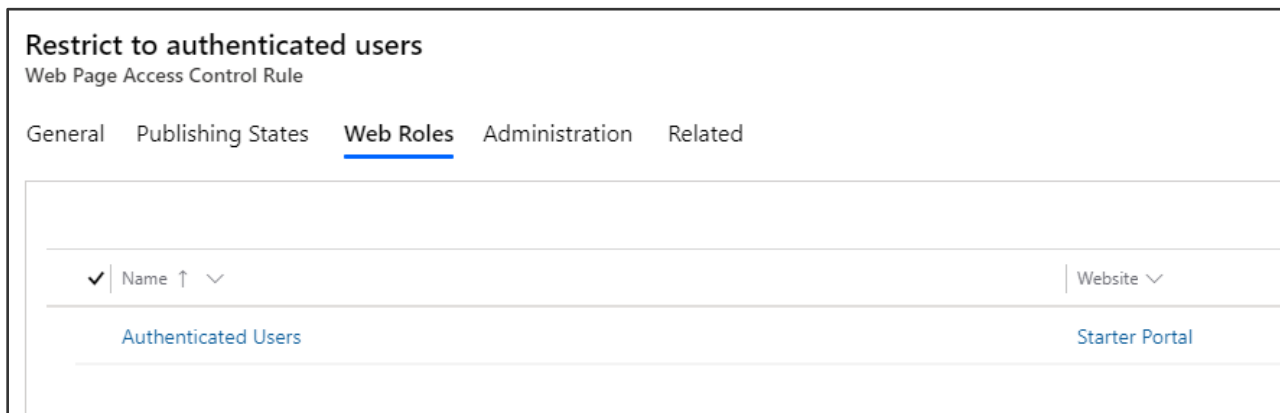

6. Select the **Web Roles** tab and click **Add Existing Web Role**.
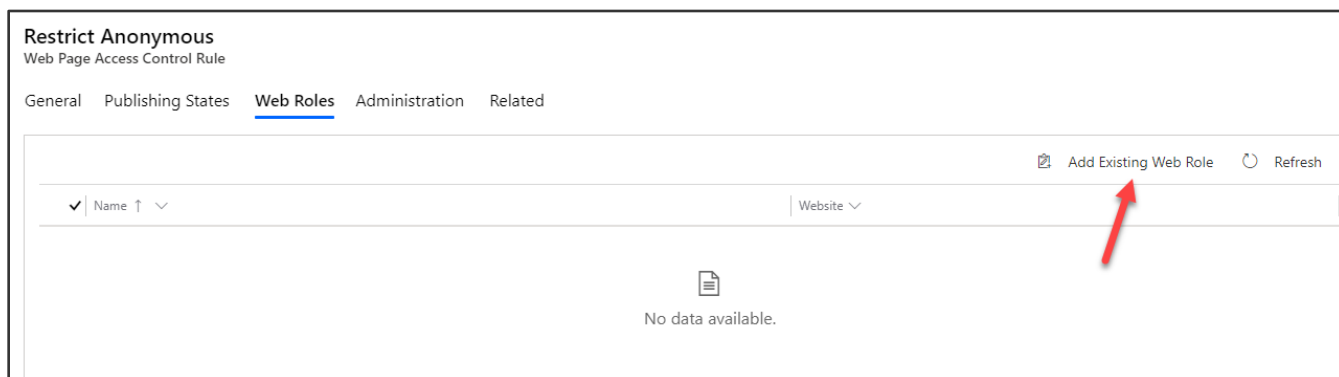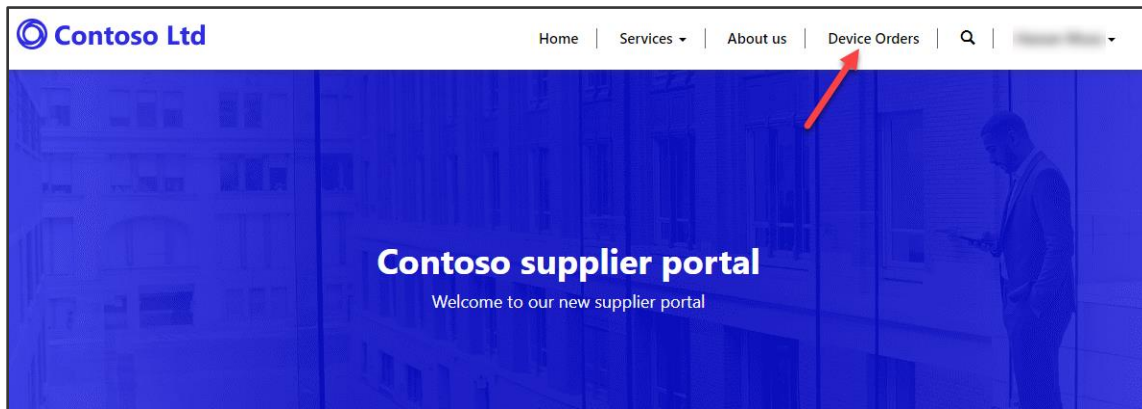
7. Select **Authenticated Users**.
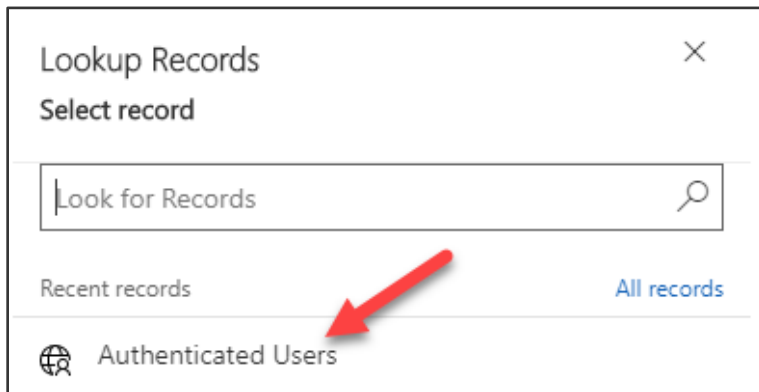
8. Click **Add**.
9. You should now have the Authenticated Users web role in the Web Roles tab. Close the Portal Management application browser window or tab.

Task 2: Test web page access control rule

1. Navigate to Power Apps Maker portal and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Supplier Portal** application.
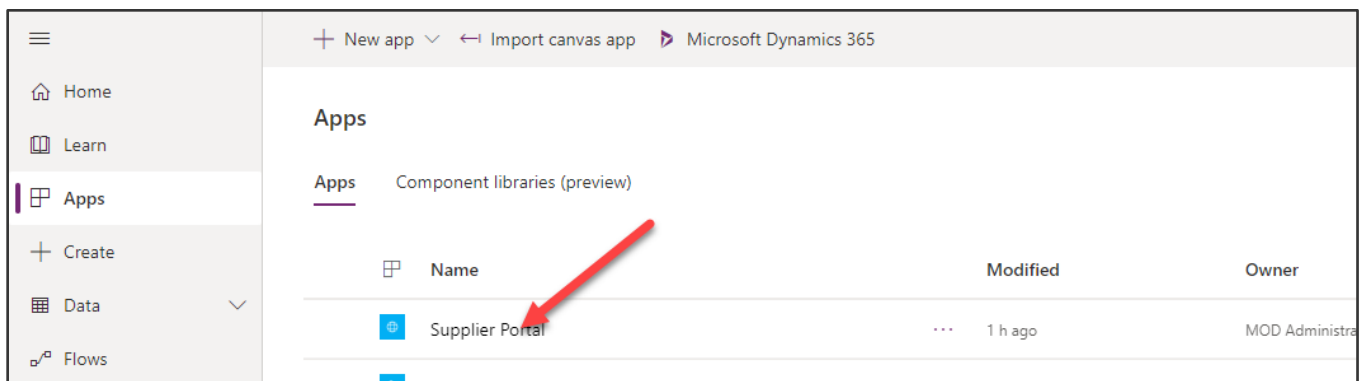
3. Click **Sign in**.
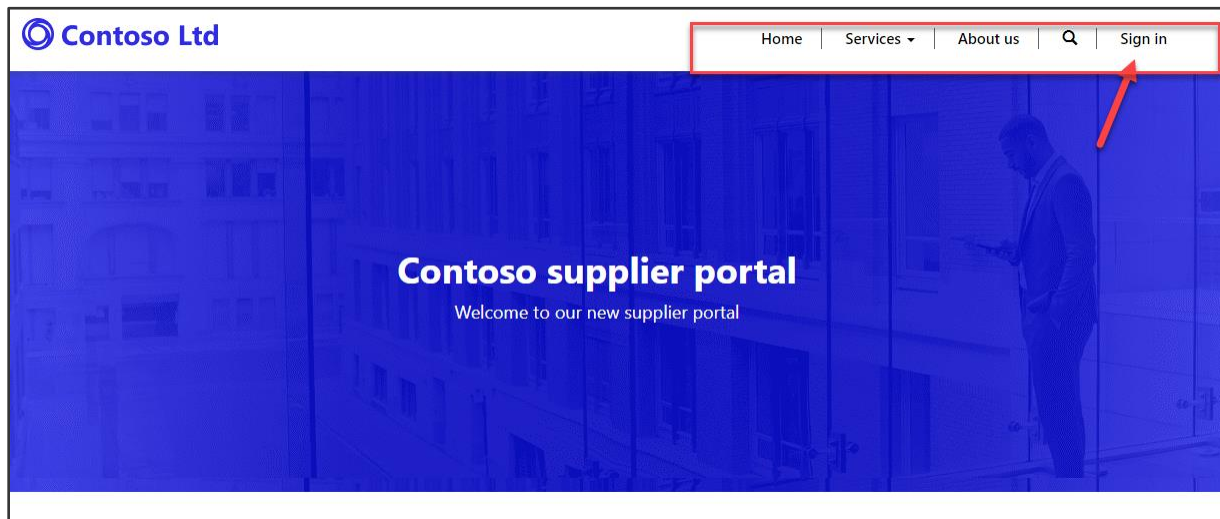
4. Select the **Register** tab.

5. Fill out the registration form and click Register.

6. Provide first and last name, and then click **Update**.

7. You should be able to see **Device Orders** in the sitemap. Click **Device Orders**.

8. You should see the list of orders. Click to open one of the orders.

9. Provide **Supplier Order ID** and **Estimated Ship Date**, and then click **Submit**.

10. The form should close, and the record should get updated.

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