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Power Apps Portal Integration with Dynamics 365 CE

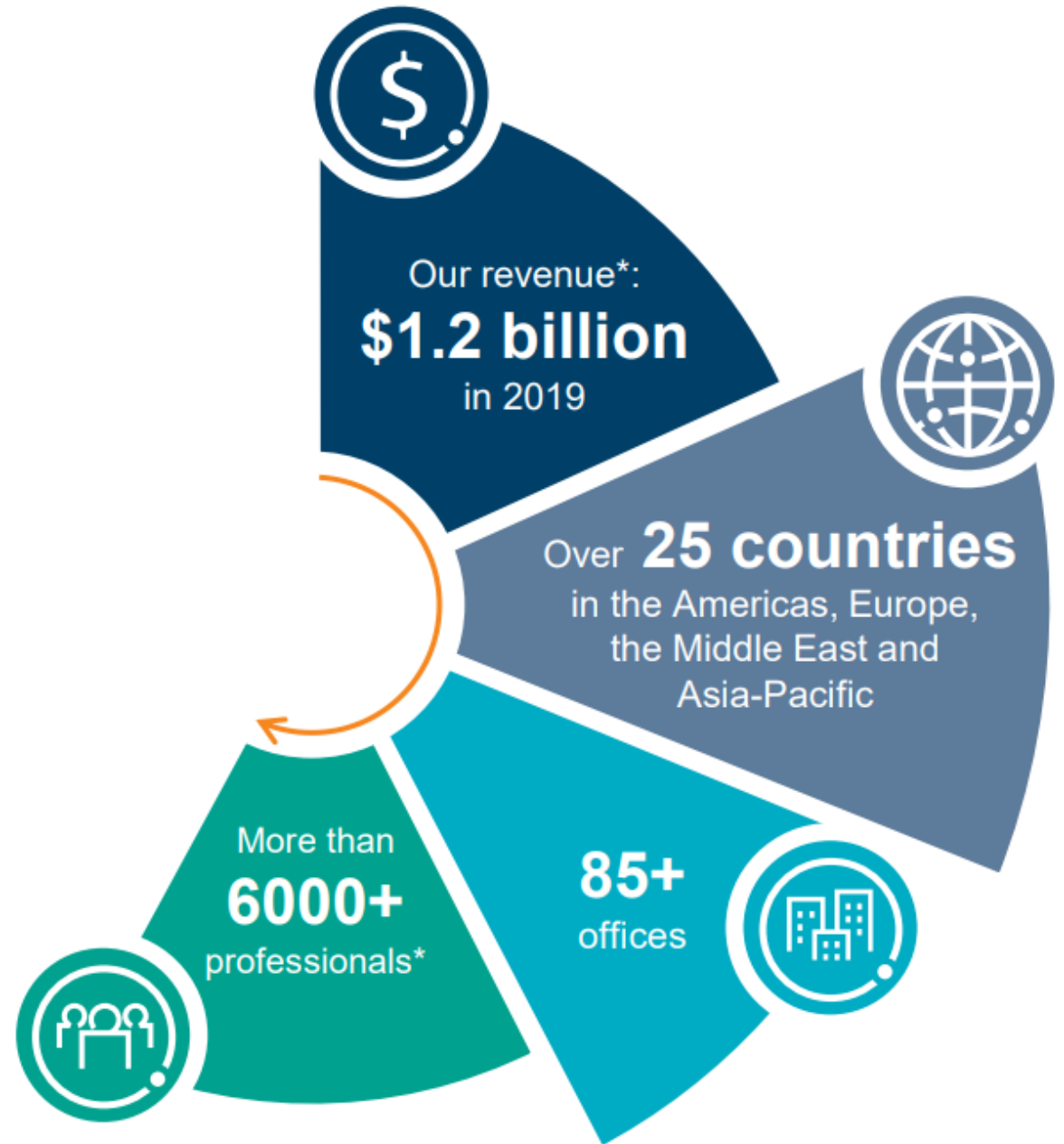
Presenter: Eric Lin

(Senior Manager | Dynamics 365 CE Lead, Protiviti)

WHO WE ARE

Protiviti is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and its independent and locally owned Member Firms provide clients with consulting and managed solutions in finance, technology, operations, data, analytics, governance, risk and internal audit through its network of more than 85 offices in over 25 countries.

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*Inclusive of Protiviti's Member Firm network

Agenda

- Introduction of Power Apps Portal
- Steps to Create a Portal Instance
- Key Portal Features
 - Entity List
 - Entity Form
 - Web Form
 - Document Upload
 - Access & Security
- Demo
- Pricing
- Q & A

History of Power Apps Portal

- Launched by Microsoft in the Fall of 2019
- Replaced Dynamics 365 Portal



Portal as an “App”

- Part of the Power Platform capabilities as an “App”
- Seamlessly integrated with the Dynamics 365 CE Platform
- Supports low-code and responsive design
- Allows external users of organizations to interact with data stored in Dataverse (Common Data Service) via the Portal website
- Provides the following scenario templates:
 - Community Portal
 - Partner Portal
 - Customer Self-Service Portal
 - Employee Self-Service Portal
 - Customer Portal
 - Custom Portal (creating portal from blank)

Steps to Create a Portal Instance

1. Login to <https://make.powerapps.com/>
2. Connect to the appropriate Dynamics 365 CE environment
3. Provision the portal, choosing either:
 - Portal template
 - Create a custom portal
4. Modify the portal, using:
 - Portal Editor in Power Apps environment
 - Portal Management in Dynamics 365
5. Browse the portal website
6. Verify the changes

Portal Features: Entity List

- A data-driven configuration to render a list of entity records on a portal web page
- Supports sorting and pagination
- Supports multiple views
- Multi-select option set is not supported

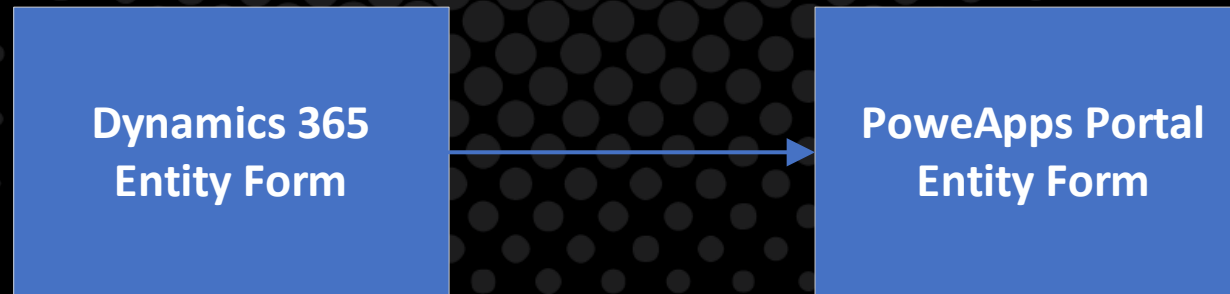
Dynamics 365
Entity View



PowerApps Portal
Entity List

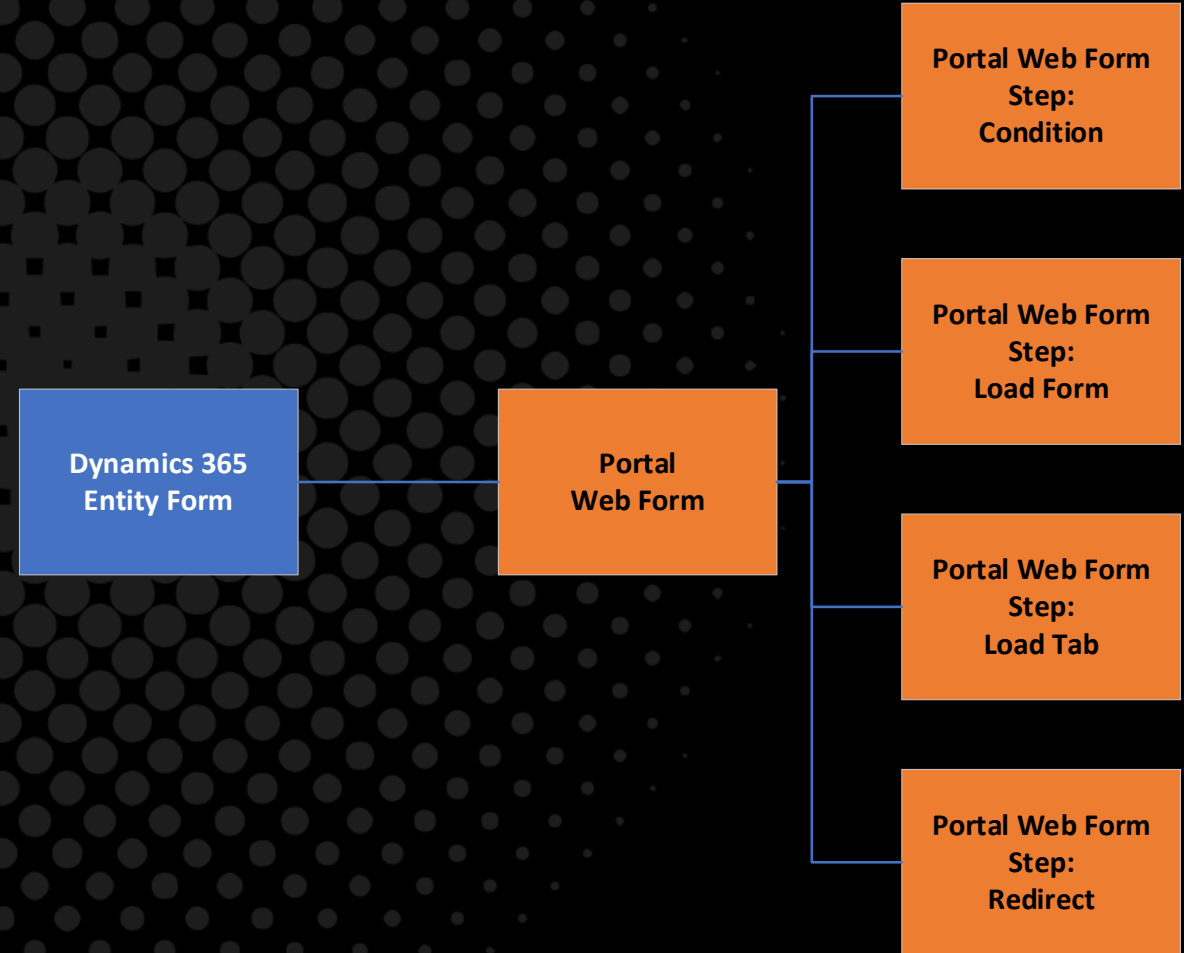
Portal Features: Entity Form

- A data-driven configuration to add an entity form to collect or display data on a portal web page
- Allows users to create, view or edit Dynamics 365 entity records on the portal
- Contains metadata features that allow advanced configurations beyond the out of the box Dynamics 365 entity form capabilities



Portal Features: Web Form

- Performs all the same tasks that an entity form can do
- Uses web form steps to control the initialization and flow of the form on the portal web pages
- Supports branching logic
- Persists the history of the steps a user has visited



Portal Features: Document Upload

- Seamless integration with SharePoint Online
- Supports uploading and displaying documents to and from SharePoint on an entity form or web form on a portal web page
- Allows portal users to view, download, add, and delete documents from a portal
- Document management is supported with server-side integration



Portal Features: Access & Security

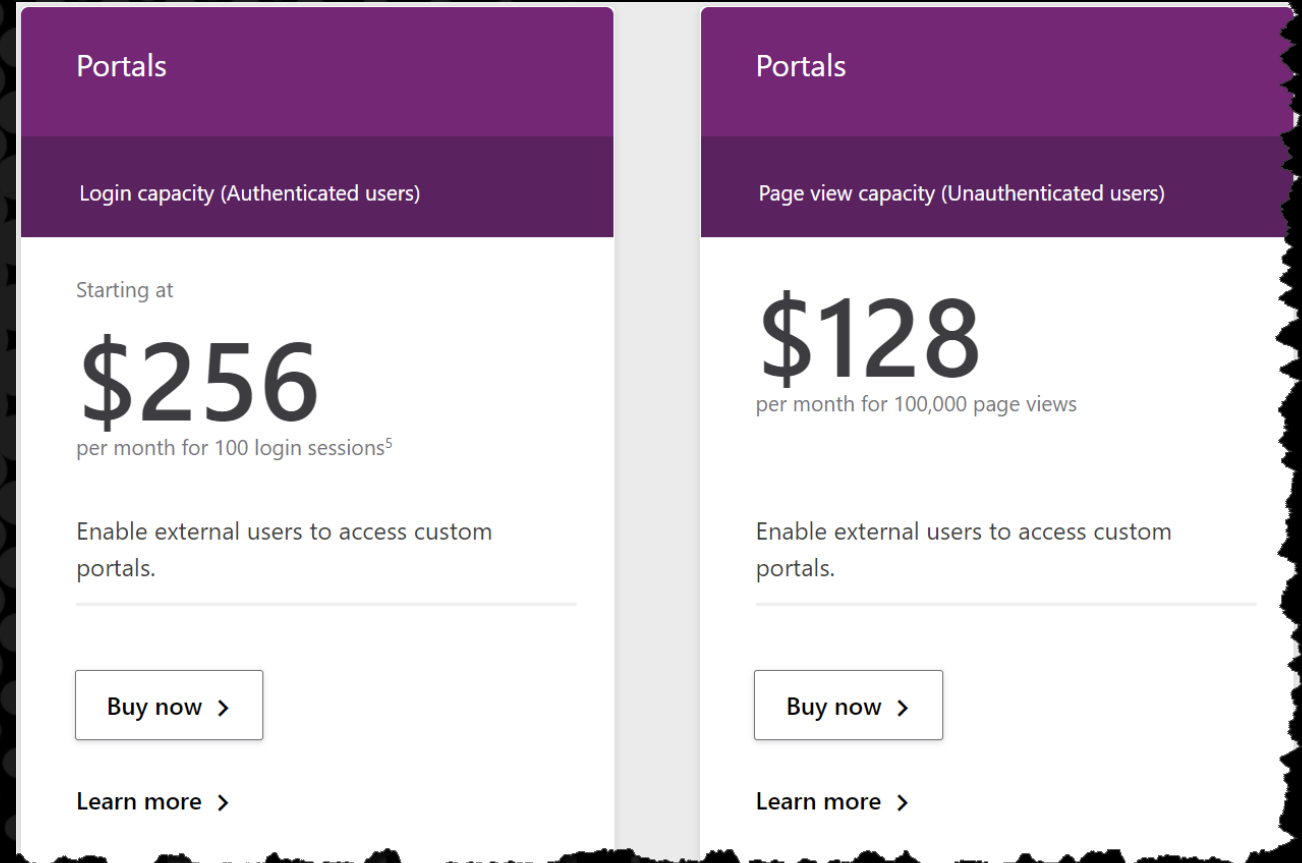
- Entity Permissions
 - Specify access scope and permissions on entity records to protect data
 - Linked to a web role
- Web Roles
 - Assigned to portal users to provide specific permission access on portal components, similar to security roles in Dynamics 365
 - Administrator, Authenticated Users, and Anonymous Users web roles are available by default; custom web roles can be created
- Web Page Access Control Rule
 - Linked to a web page and a particular web role to protect content



DEMO

Portal Pricing

- Enable external users to access portals
- Internal user access included in qualifying Dynamics 365 subscription, or qualifying Power Apps plans



Portals	Portals
Login capacity (Authenticated users)	Page view capacity (Unauthenticated users)
Starting at \$256 per month for 100 login sessions ⁵	\$128 per month for 100,000 page views
Enable external users to access custom portals.	Enable external users to access custom portals.
Buy now >	Buy now >
Learn more >	Learn more >

*Source: <https://powerapps.microsoft.com/en-us/pricing/>

Thank You!

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