

# Powering Business Growth with Microsoft Dynamics 365 and the Art of Client Portal Expansion

Solutions for Success Education Series

Solutions for Success



POINT ALLIANCE

# Agenda

- About Point Alliance
- Why would you consider Microsoft Dynamics 365 for customer portals
- How do you enable these portals
- What are the tools that are used
- How do users authenticate
- Demos

# Point Alliance

- Microsoft Modern Workplace Solution Designation
- Microsoft Gold Partner with 11 Competencies (legacy)
- 100% Microsoft Certified Team
- [pointalliance.com/companyprofile](https://pointalliance.com/companyprofile)



Modern Work



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# Why enable it ?

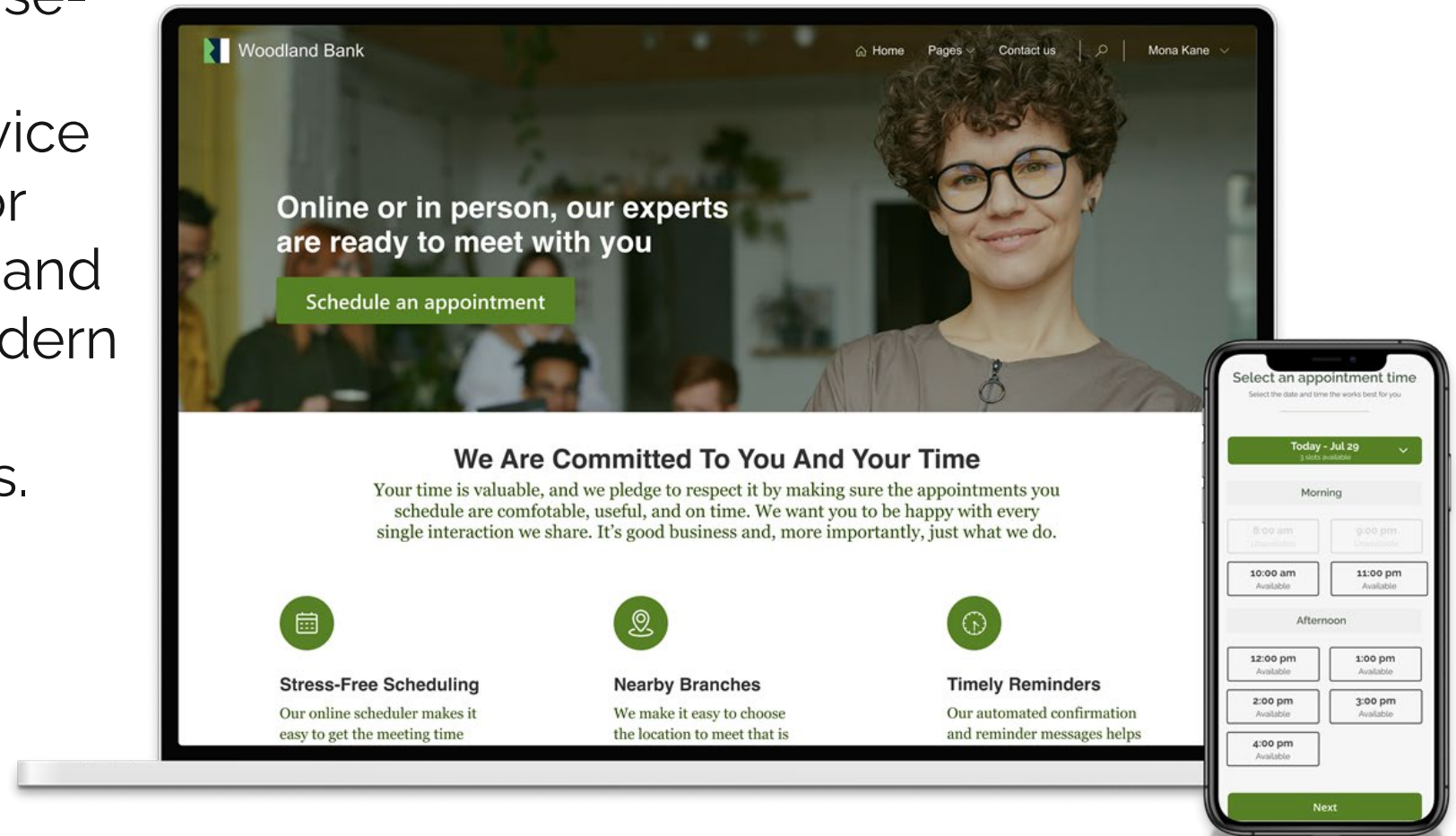
- Information for Customers, Partners and Employees already exists on D365. Extending this information outside of the D365 solution can leverage several features within the product.
  - ❑ Partners (Accounts) can manage their own Opportunity, manage their customer accounts and contacts.
  - ❑ Customers/Members (Accounts/Contacts) – can use the Customer Portal to create service requests/tickets, manage member information.
  - ❑ Employees – can use as Employee Service Portal to provide self service to content.

# Options for enabling portals

1. Microsoft Power Pages – We'll focus on this approach today
2. Sitefinity + The Portal Connector (TPC)
3. Custom portal

# What Are Power Pages?

- A secure, enterprise-grade, low-code software as a service (SaaS) platform for creating, hosting, and administering modern external-facing business websites.





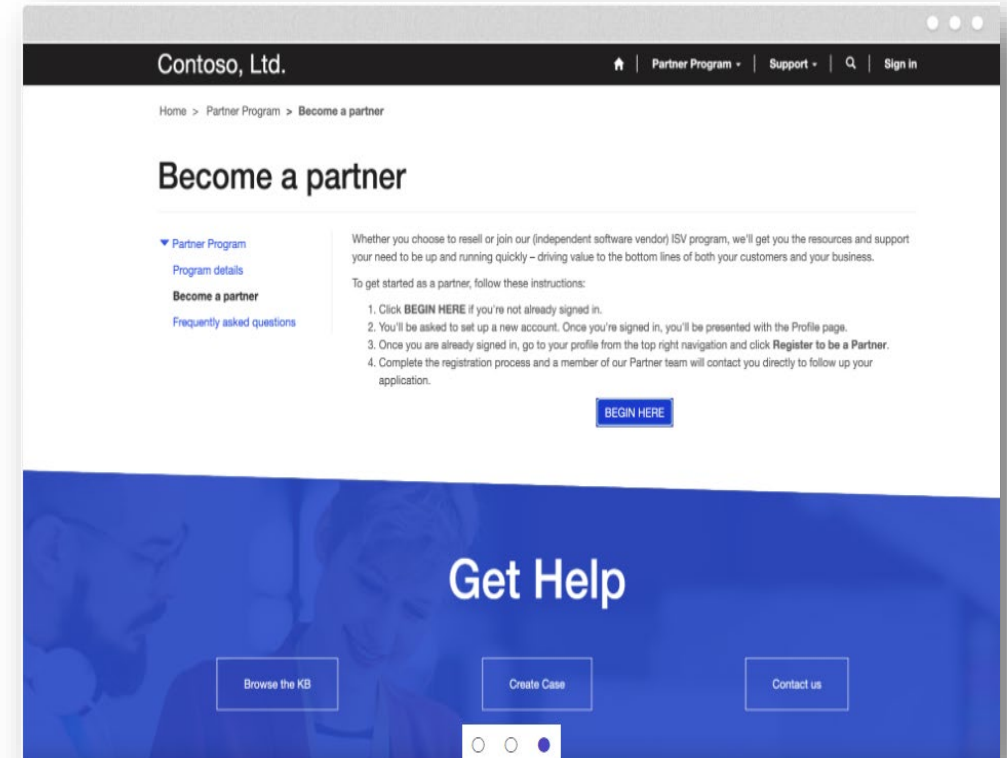
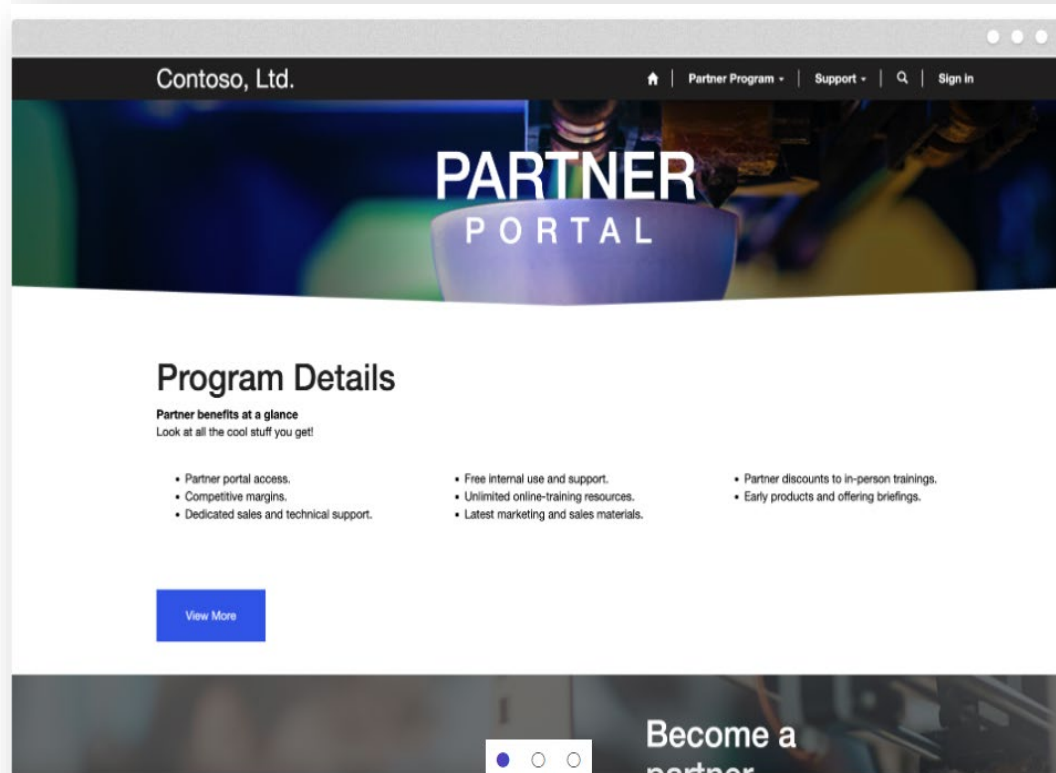
# How do I customize and extend Power Pages?

- In many projects, there's a need to further extend the capabilities of the web application that require pro-development techniques.
- The Power Pages platform provides tools and technologies that empower a developer to address advanced and complex requirements.
- Tools are available to Power Pages developers to create assets, and to edit HTML, JavaScript, Liquid, and CSS code.

# Tools described

- Websites created using Power Pages can utilize client-side JavaScript to address many requirements.
- Liquid is an open-source template language integrated into Power Pages. It can securely retrieve data from Microsoft Dataverse and dynamically display content on webpages.
- You can use the Web API to perform create, read, update, and delete operations across all Microsoft Dataverse tables from your webpages.
- Power Pages supports controls built for Power Apps created using the [Power Apps component framework](#).

# Sample Partner Portal



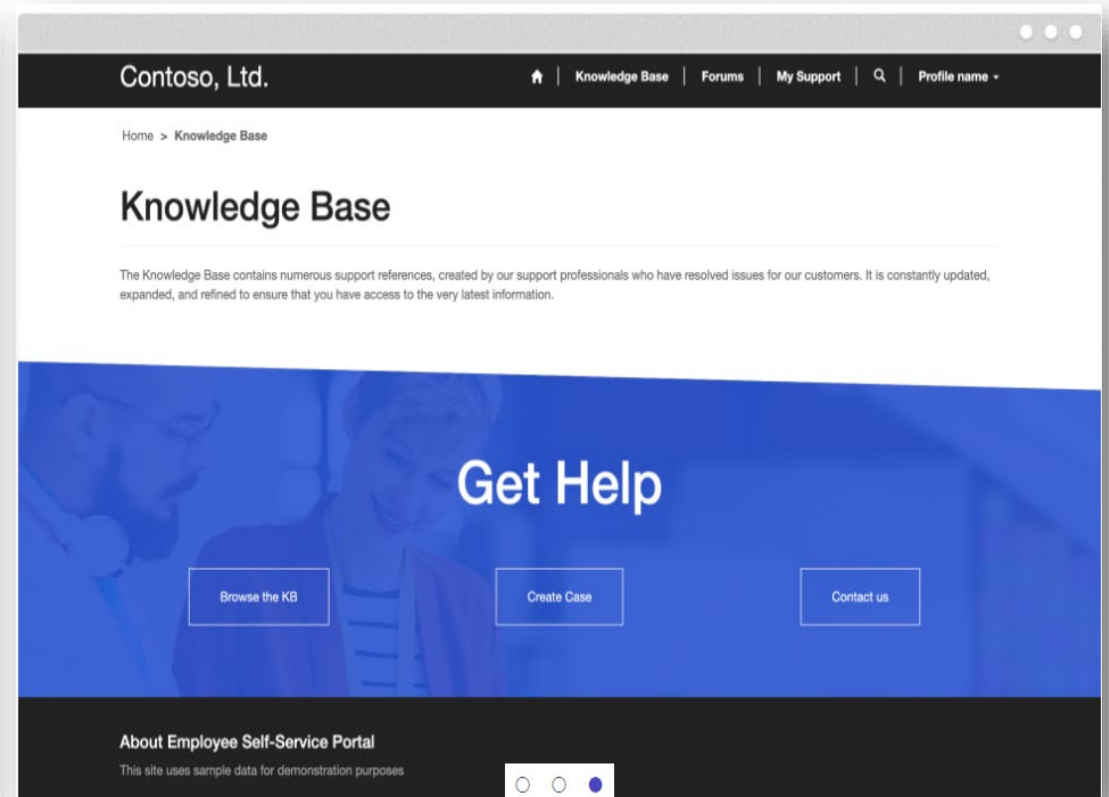
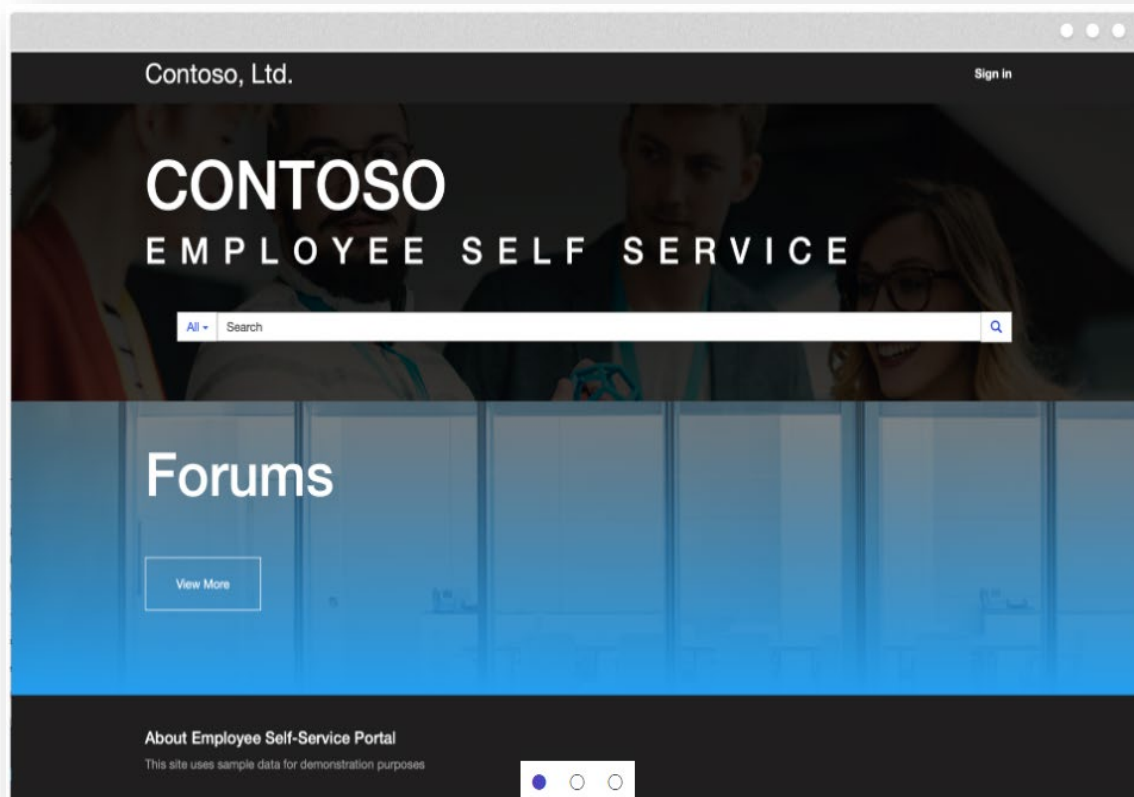
# Partner Portal

- Allows Partners to add their own Customer Accounts and Contacts
- Allows Partners to manage their own Opportunities, see their own Opportunities.
- Allows Partners to manage customer information for opportunities.
- Common Knowledge Based for Partners
- Use local authentication. (default form-based authentication)

# Sample Partner Portal Security

- Partner Seller
- Partner Manager
- Partner Admin

# Sample Employee Self Service Portal



# Employee Self Service Portal (Microsoft Template )

- Knowledge Based Articles
- Internal Support Tickets (extend)
- Forum – with Online discussion.
- Authentication: Use Azure Active Directory. Internal Users, requires D365 licenses in using the application.

# Options for Portal Authentication

- Local Authentication
- External Authentication
  - Azure AD – (for Employee Self Service - template).
  - Azure B2C
  - 3<sup>rd</sup> Party ID Provider



# Local Authentication

- Form Based Authentication

Contoso, Ltd. | Home | Partner Program | Support | Sign in

Sign in | Register | Redeem invitation

Sign in with a local account | Sign in with an external account

\* Username  [Azure AD](#)

\* Password

☐ Remember me?

[Sign in](#) [Forgot your password?](#)

Get Help

Contoso, Ltd. | Home | Partner Program | Support

[Sign in](#) | **Register** | [Redeem invitation](#)

Register for a new local account | Register using an external account

\* Email  [Azure AD](#)

\* Username

\* Password

\* Confirm password

[Register](#)

# External Authentication

 **Power Pages**

Environment  
Point Alliance Sandbox

PAI Client Portal - Public - Saved

### Set up

**General**

- Site details
- Go-live checklist

**Authentication**

- Identity providers**

**Security**

- Table permissions
- Site visibility

**Mobile**

- Progressive web application

**Integrations**

- Chatbot (preview)
- Cloud flows
- External apps (preview)

### Identity providers

[+ New provider](#) [Authentication settings](#)

| Name                                                                                                         | Provider                   | Status                    |
|--------------------------------------------------------------------------------------------------------------|----------------------------|---------------------------|
|  Local sign in              | Local sign in              | Disabled                  |
|  Azure Active Directory     | Azure Active Directory     | Disabled                  |
|  Azure Active Directory B2C | Azure Active Directory B2C | <a href="#">Configure</a> |
|  Facebook                   | Facebook                   | <a href="#">Configure</a> |
|  LinkedIn                  | LinkedIn                   | <a href="#">Configure</a> |
|  Google                   | Google                     | <a href="#">Configure</a> |
|  Twitter                  | Twitter                    | <a href="#">Configure</a> |
|  Microsoft                | Microsoft                  | <a href="#">Configure</a> |

# Demo Sample Partner Portal

- Partners Customers and Contacts is managed by Partner.
- Opportunities submitted by Partner.
- Accounts and Contacts for Partner.
- Managing Access for Partners and its users.

# Upcoming S4S Webinars

- Third Tuesday of Each Month
- [pointalliance.com/events](https://pointalliance.com/events)

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