

A stylized logo graphic consisting of a dark blue chevron pointing right, with a white chevron pointing left nested inside it.

STONERIDGE CONNECT

2017 Client Conference



Using Portal Capabilities in
Dynamics 365



About the Speaker

Kim Johnson

CRM Architect

Microsoft: 11 years

Total Industry Experience: 12 years

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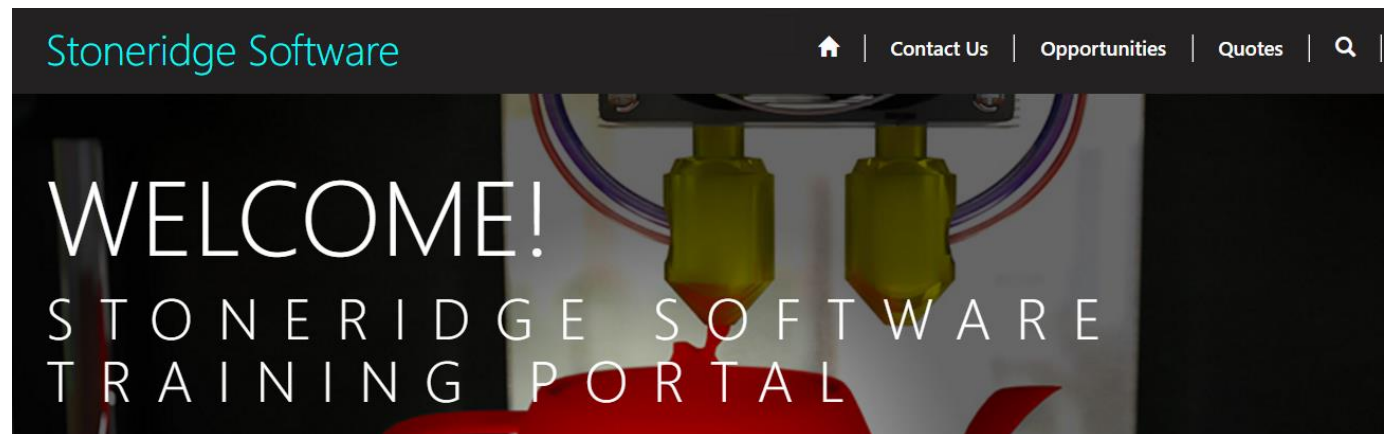
Agenda

- What is a Portal?
- Available Base Portals
- Elements of Basic Setup
- Security
- Demo

What is a Portal?

The Dynamics 365 Portals allow a Dynamics 365 Online organization to make their CRM data available to external or internal users that are not licensed Dynamics 365 users.

There are base portals that have some basic configuration for certain entities and there is a custom portal available where there are no entities configured.



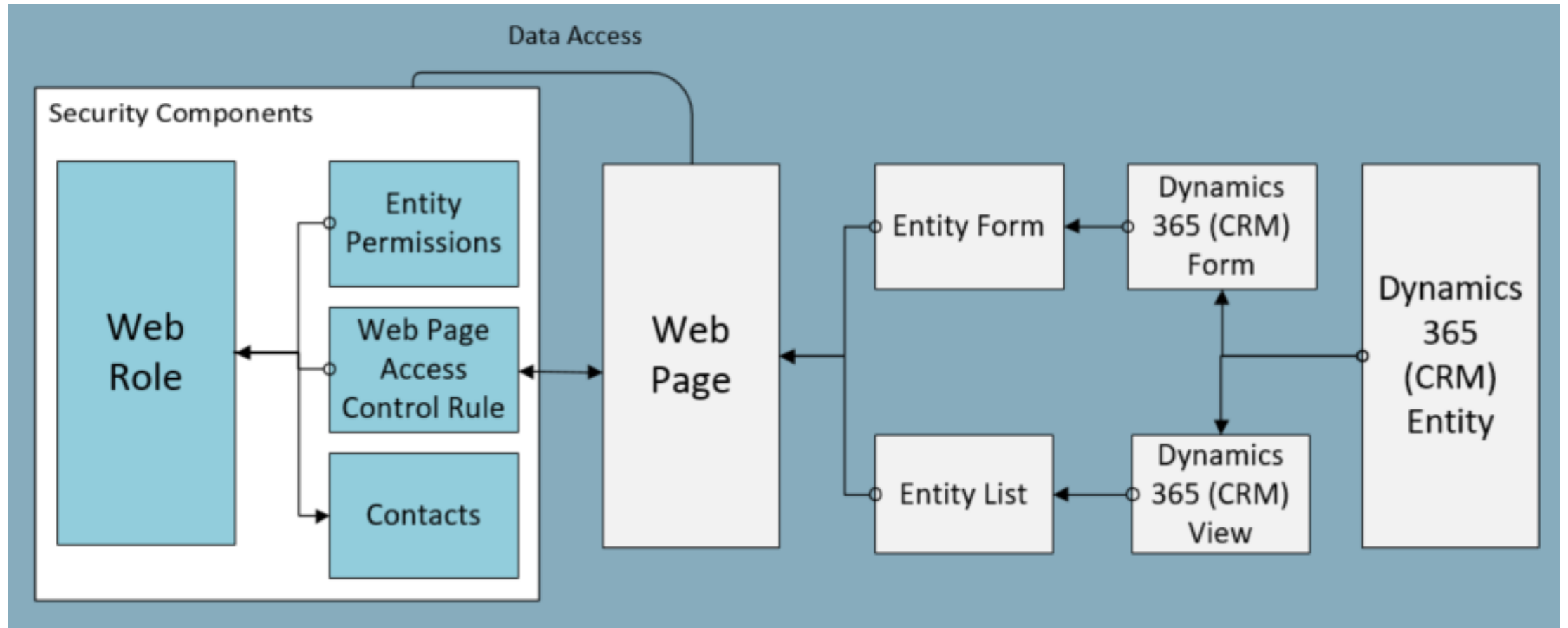
Available Base Portals

- Customer Self-Service
- Employee Self-Service
- Community
- Partner
- Event
- Custom
- Field Service and Project Service Automation

The screenshot displays the 'Stoneridge Software' portal. The top navigation bar includes links for Home, Contact Us, Opportunities, Quotes, a search icon, and a user profile for Mary Johnson. The main heading is 'Opportunities'. Below this is a search bar and a link to 'Open Opportunities'. A table lists two opportunities, each with a dropdown arrow for email. The table columns are Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, Rating, and Email (Potential Customer).

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating	Email (Potential Customer)
Opportunity Test	Coho Winery (sample)				Warm	▼
6 orders of Product SKU JJ202 (sample)	Adventure Works (sample)	5/4/2017	\$7,900.00	90	Hot	▼

Architecture



Security

Contacts gain access to the portal by either an invitation being sent to them or registering on the website. The contact must be associated to a web role to access pages that have security enabled.

The web role contains the entity permissions that determine what information they can view, create or change. The web role is also associated to web page control rules which can hide certain pages or grant edit rights to certain pages.

Entity Permissions

The screenshot shows the Dynamics 365 interface for configuring entity permissions. The breadcrumb trail at the top indicates the path: Dynamics 365 > Portals > Entity Permissions > Managing Account - The main title is 'Managing Account - ...'. Below the title, the 'General' tab is selected. The 'Name' field is set to 'Managing Account - Opportunities'. The 'Entity Name' field is set to 'opportunity'. The 'Website' field is empty. The 'Scope' field is set to 'Account', which is highlighted in a blue box with a blue arrow pointing to it. The 'Account Scope' section shows 'Account Relationship' set to 'new_account_opportunity_ManagingAccount'. The 'Privileges' section shows checkboxes for Read, Create, Append, Write, Delete, and Append To, all of which are checked.

ENTITY PERMISSION : INFORMATION

Managing Account - ...

General

Name* Managing Account - Opportunities

Entity Name* opportunity

Website*

Scope*

Account Scope

Account Relationship* new_account_opportunity_ManagingAccount

Privileges

Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>	Delete	<input type="checkbox"/>
Append	<input checked="" type="checkbox"/>	Append To	<input checked="" type="checkbox"/>

Entity Permissions

The screenshot shows the Dynamics 365 interface for configuring entity permissions. The top navigation bar includes 'Dynamics 365', 'Portals', and 'Entity Permissions > Managing Account - ...'. Below this is a command bar with options like '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', and 'RUN REPORT'. The main content area is titled 'ENTITY PERMISSION : INFORMATION' and 'Managing Account - Opportunities'. It features three sections: 'Account Scope' with a dropdown set to 'opportunity_customer_accounts', 'Privileges' with checkboxes for Read, Create, Append, Write, Delete, and Append To (all checked except Delete), and 'Child Entity Permissions' which contains a table of permissions for related entities.

ENTITY PERMISSION : INFORMATION

Managing Account - Opportunities

Account Scope

Account Relationship* **opportunity_customer_accounts** opportunity_customer_accounts


Privileges

Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>	Delete	<input type="checkbox"/>
Append	<input checked="" type="checkbox"/>	Append To	<input checked="" type="checkbox"/>

Child Entity Permissions

Name ↑	Entity Name	Parent Relationship	Read	Write	Create	Delete	Append	Append To
Account	account	opportunity_customer_acc...	Yes	Yes	No	No	Yes	Yes
Managing Account - Opportunity Products	opportunityproduct	product_opportunities	Yes	Yes	Yes	Yes	Yes	Yes

Web Page Access Control Rules


 Dynamics 365 ▾ Portals ▾ Web Page Access Co...

WEB PAGE ACCESS CONTROL RULE : INFORMATION

Quotes

General

Name *	Quotes
Website *	Custom Portal
Web Page *	Quotes
Right *	<div>Grant Change</div> <div>Restrict Read</div>
Description	

 Dynamics 365 ▾ Portals ▾ Web Page Access Co... > Quotes >

WEB PAGE ACCESS CONTROL RULE : INFORMATION

Quotes

Name ↑	Website
Managing Account	Custom Portal

Web Roles

The screenshot displays the Dynamics 365 user interface for configuring web roles. The top navigation bar includes 'Dynamics 365', 'Portals', and 'Web Roles > Managing Account'. The main content area is titled 'WEB ROLE : INFORMATION' and 'Managing Account'. Below this is the 'Entity Permission Associated View' with a search bar and action buttons like 'ADD EXISTING ENTITY PER...', 'BULK DELETE', 'CHART PANE', 'RUN REPORT', 'EXCEL TEMPLATES', and 'EXPORT ENTITY PERMISSI...'. A table lists the permissions for the 'Managing Account' web role across various entities.

✓	Name ↑	Entity Name	Scope	Read	Write	Create	Delete	Append	Append To	Cont
	Currency	transactioncurrency	Global	Yes	No	No	No	Yes	Yes	
	Managing Account - Contact	contact	Account	Yes	No	No	No	Yes	Yes	contact_customer
	Managing Account - Account	account	Account	Yes	Yes	Yes	No	Yes	Yes	
	Managing Account - Opportunities	opportunity	Account	Yes	Yes	Yes	No	Yes	Yes	
	Managing Account - PriceLists	pricelevel	Global	Yes	No	No	No	Yes	Yes	
	Managing Account - Products	product	Global	Yes	No	No	No	Yes	Yes	
	Managing Account - Quote	quote	Account	Yes	Yes	Yes	No	Yes	Yes	
	Unit	uom	Parent	Yes	No	No	No	Yes	Yes	
	Unit Group	uomschedule	Global	Yes	No	No	No	Yes	Yes	

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Demo

Questions?

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