How to Configure a DynamicPoint Portal

**Intro**

Today we are going to demonstrate how you can easily create a Customer, Vendor or Employee Portal using Office 365 together with the DynamicPoint Portal application. While it is possible to integrate the portal with a multitude of applications, today we are going to illustrate using Microsoft Dynamics.

**Office 365 SharePoint Portal**

*Microsoft Dynamics Integration*
Configuring the portal entails the following 5 steps:

- Configure Office 365 SharePoint
- Install DynamicPoint Portal App
- Select Data Objects from the ERP / CRM
- Configure Portal Services
- Layout Page

### 5 easy steps

1. Configure Office 365 SharePoint
2. Install DynamicPoint Portal App
3. Select Data Objects from ERP / CRM
4. Configure Portal Services
5. Layout Page

---

Step 1: Configure SharePoint

The first step is configuring the portal dashboard page, including various calls to action, images, branding, logos, documents for sharing, and such additional features as live chat or Power BI reports.
### Topic: Step 2: Install Portal App

The second step is to install the DynamicPoint app to the page. After it has been added to the App Catalog it can be included on the new portal site that was setup in the prior step. It simply must be clicked on and trusted.

### Topic: Step 3: Select the Dynamics Data Objects

Select the ERP / CRM data objects you want to expose on the portal. These objects are available from each product’s web services admin page. Any data object can be exposed for collaboration on the portal. Just copy the URL for the object.
**Step 4: Configure the Service App**

After obtaining the URL of the data object, the service can be configured in the portal app. The service will determine the fields displayed, parent-child relationships, view/edit/create permissions, as well as if we want to include the ability to render any reports in the portal.

**Step 5: Finish Page Layout**

The final configuration step is associating any portal services we created with calls to action in the portal. This entails establishing the link from the various icons and hyperlinks in the portal to the URL of the applicable service app.
Test it Out  We are ready to test it out. Just click on any of the icons and watch the information be rendered in a live call to the underlying data in the ERP or CRM system.

More Features  There is so much more that is possible that we didn’t cover. This list is just some of the additional features we can leverage to make the experience even more functional for our customers, vendors and employees.

What else is possible

Data integration
- Connect to any web service
- Establish parent child relationship, line items

Functions
- Read, Edit, Create
- Filter information
- Report integration

Extensions
- Workflow with Microsoft Flow
- Mobile App with PowerApps