Portal Self-Service Setup

- New, or existing, instance of Dynamics 365 Customer Service
- Configure Customer Service portal add-on. Instructions: https://docs.microsoft.com/en-us/powerapps/maker/portals/provision-portal-add-on
- Install and setup Unified Resource Planning
- Import Centric Portal managed
- Import the Portal configuration and Bookable Resource setup data via Data Migration Tool.
- This will create a new website named "ABC Property Management Co. - URS"
- Switch active portal, if pointing to the default "Custom", to ABC Property Management Co – URS

Portal User Instructions

1. Open portal in browser (https://abcproperty.powerappsportals.com/).
2. Sign in as a new or returning customer
   a. New Customers: Use the New Customer Login form on the home page.
   b. Returning Customers: Click the hyperlink on the home page to get to the Returning Client form.
3. Select the month in which you are planning on moving.
4. Include model type or floor plan preferences in the text box. (Optional)
5. Choose a date for your tour.
6. Choose an available time in the dropdown.
7. Select one or more apartment size options. (Studio, 1 Bedroom, 2 Bedroom, etc.)
8. Select a property from the dropdown.
9. Click "Schedule Tour".
10. Within 2-3 minutes of clicking "Schedule Tour" you will receive a confirmation email which includes the details of your appointment and a hyperlink to cancel the appointment.
    a. To cancel your appointment, click the hyperlink.