

# How to Configure a DynamicPoint Portal

Topic	Narrative
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 with Microsoft Dynamics.



Topic	Narrative
<b>Agenda</b>	Configuring the portal entails the following 5 steps: <ul style="list-style-type: none"> <li>• Configure Office 365 SharePoint</li> <li>• Install DynamicPoint Portal App</li> <li>• Select Data Objects from the ERP / CRM</li> <li>• Configure Portal Services</li> <li>• Layout Page</li> </ul>

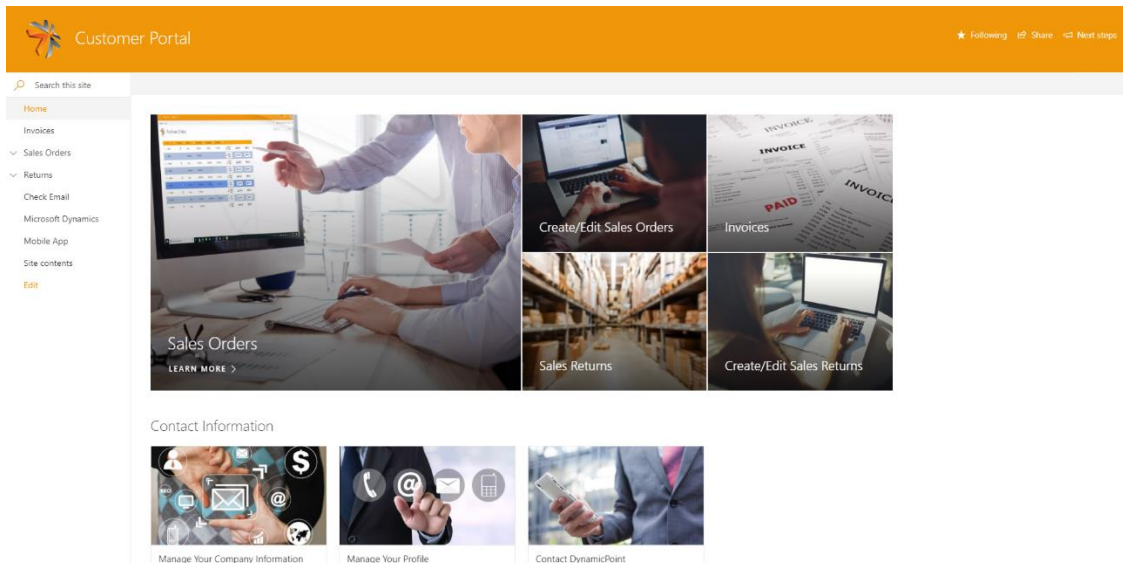


## 5 easy steps

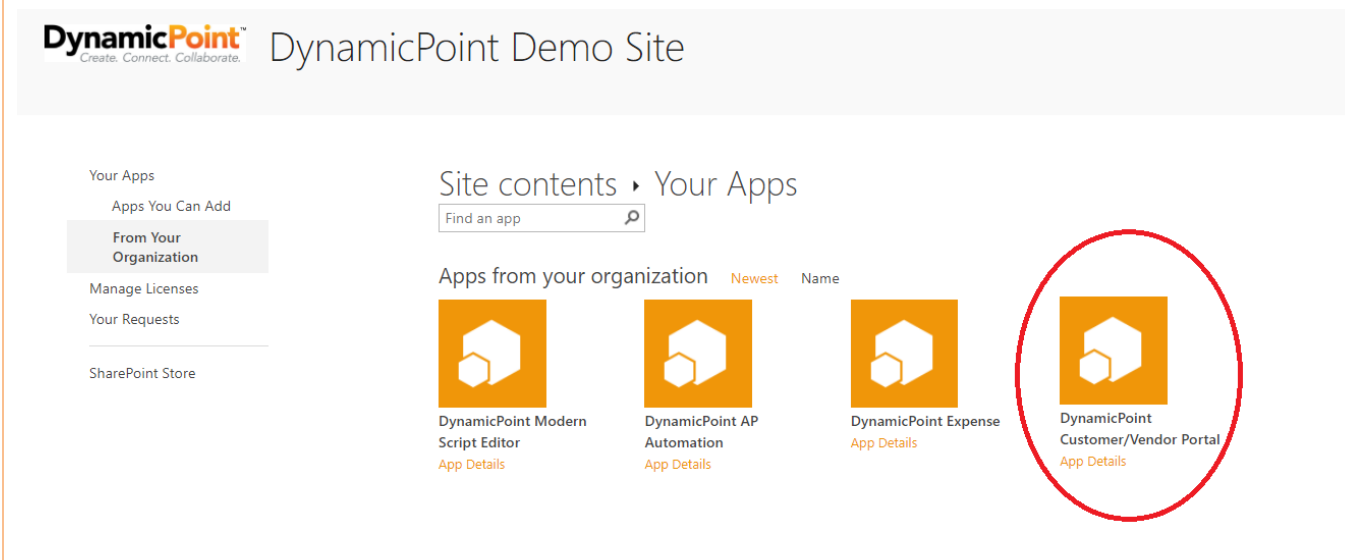
1. Configure Office 365 SharePoint
2. Install DynamicPoint Portal App
3. Select Data Objects from ERP / CRM
4. Configure Portal Services
5. Layout Page



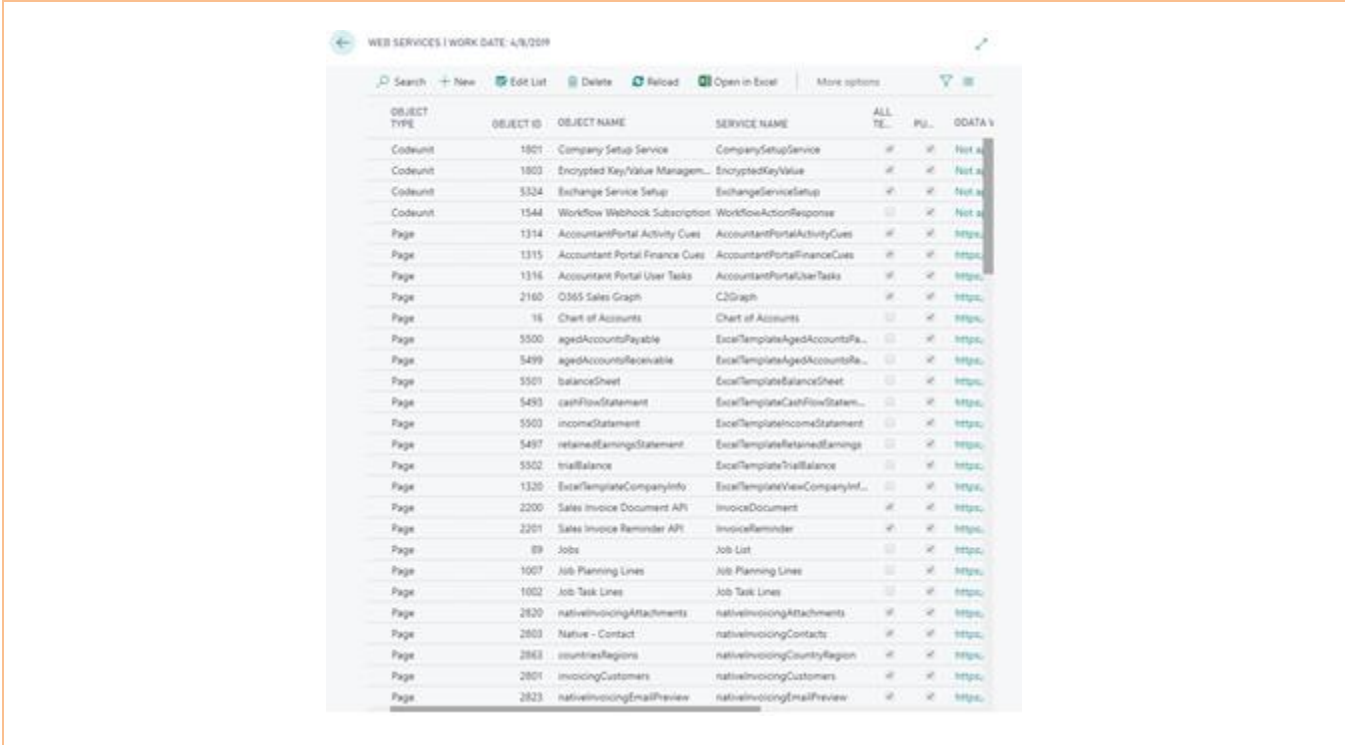
<b>Step 1: Configure SharePoint</b>	The first step is configuring the portal dashboard page, including various calls to action, images, branding, logos, documents for sharing, and such additional features as live chat or Power BI reports.
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Topic	Narrative
<b>Step 2: Install Portal App</b>	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.



Step 3: Select the Dynamics Data Objects	Narrative
	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.



Topic	Narrative
<b>Step 4: Configure the Service App</b>	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.

## Customer Portal

### Services

[+ Create](#)

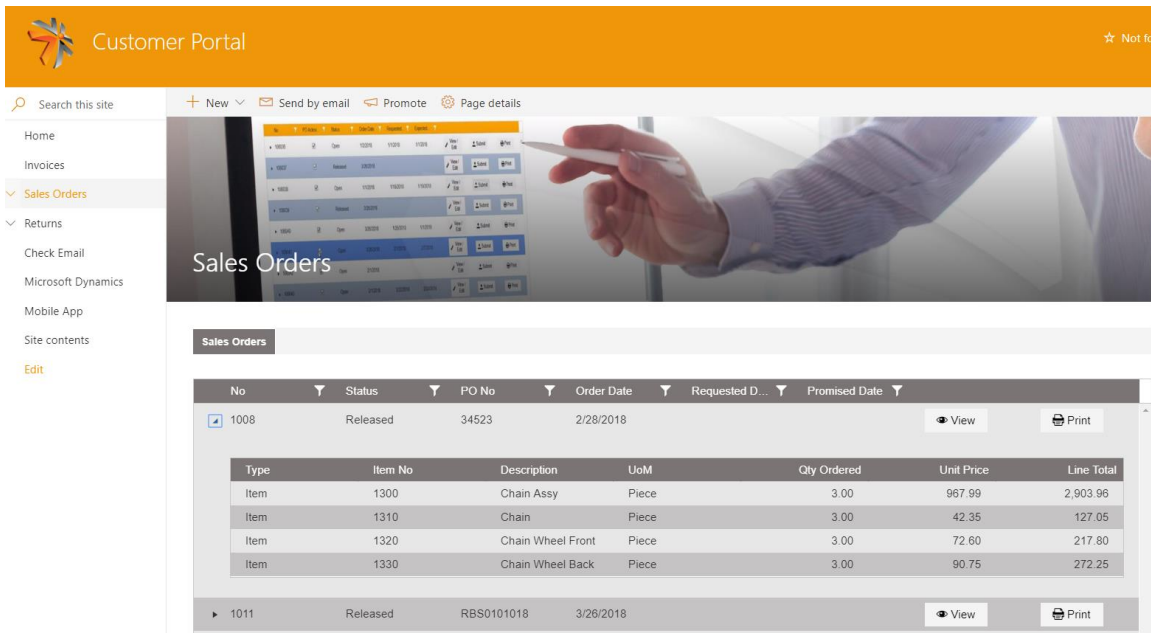
ID	Title	Service Base Url	Company/Resource	Def...	Act...	
100	Customer Information	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/CustomerCard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
101	Contacts	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
102	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
103	Sales Returns	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesReturnOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
104	Create/Edit Return Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesReturnOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
105	Create/Edit Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
106	Open Invoices	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/CustomerLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
107	Historical Invoices	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/CustomerLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
145	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
146	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/odata/	Company('00')/SalesOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>
293	Hickman Sales order	http://nav2017.dynamicpoint.com:7048/DynamicsNav100/odata/	Company('00')/SalesOrder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Details</a>   <a href="#">Delete</a>   <a href="#">Clear cache</a>

Page 1 of 1 | 20 items per page | 1 - 11 of 11 items

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.
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The screenshot displays the 'Customer Portal' configuration environment. On the left, a navigation menu includes 'Home', 'Invoices', 'Sales Orders', 'Returns', 'Check Email', 'Microsoft Dynamics', 'Mobile App', and 'Site contents'. The main workspace features a grid of service tiles with titles like 'Sales Orders', 'Invoices', 'Sales Returns', and 'Create/Edit Sales Returns'. A 'Hero' panel on the right is active, showing a 'Link' configuration for 'Sales Orders' with a title field and a 'Show title in layout' checkbox.

Topic	Narrative
<b>Test it Out</b>	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.



**Customer Portal**

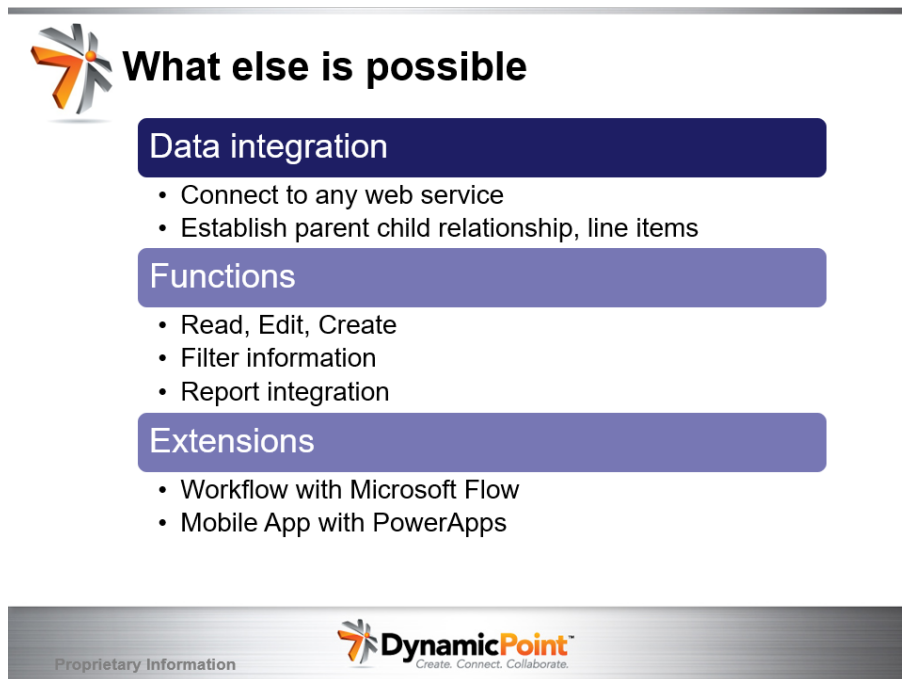
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Home  
Invoices  
**Sales Orders**  
Returns  
Check Email  
Microsoft Dynamics  
Mobile App  
Site contents  
Edit

**Sales Orders**

No	Status	PO No	Order Date	Requested D...	Promised Date																																				
1008	Released	34523	2/28/2018			View Print																																			
<table border="1"> <thead> <tr> <th>Type</th> <th>Item No</th> <th>Description</th> <th>UoM</th> <th>Qty Ordered</th> <th>Unit Price</th> <th>Line Total</th> </tr> </thead> <tbody> <tr> <td>Item</td> <td>1300</td> <td>Chain Assy</td> <td>Piece</td> <td>3.00</td> <td>967.99</td> <td>2,903.96</td> </tr> <tr> <td>Item</td> <td>1310</td> <td>Chain</td> <td>Piece</td> <td>3.00</td> <td>42.35</td> <td>127.05</td> </tr> <tr> <td>Item</td> <td>1320</td> <td>Chain Wheel Front</td> <td>Piece</td> <td>3.00</td> <td>72.60</td> <td>217.80</td> </tr> <tr> <td>Item</td> <td>1330</td> <td>Chain Wheel Back</td> <td>Piece</td> <td>3.00</td> <td>90.75</td> <td>272.25</td> </tr> </tbody> </table>							Type	Item No	Description	UoM	Qty Ordered	Unit Price	Line Total	Item	1300	Chain Assy	Piece	3.00	967.99	2,903.96	Item	1310	Chain	Piece	3.00	42.35	127.05	Item	1320	Chain Wheel Front	Piece	3.00	72.60	217.80	Item	1330	Chain Wheel Back	Piece	3.00	90.75	272.25
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1011	Released	RBS0101018	3/28/2018			View Print																																			

More Features	Narrative
<b>More Features</b>	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

Proprietary Information

