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 using Microsoft Dynamics.

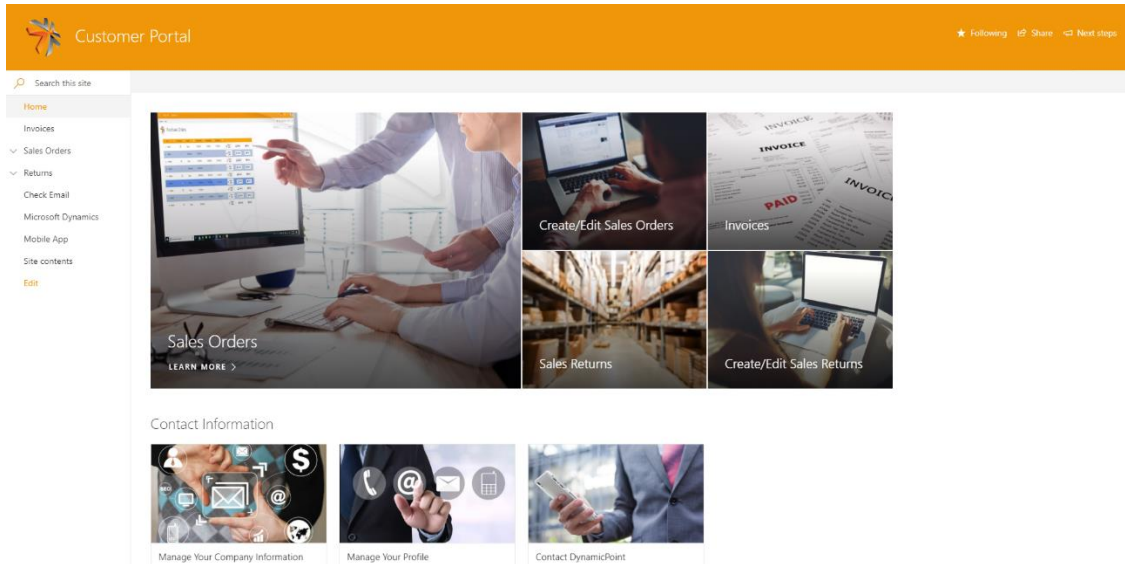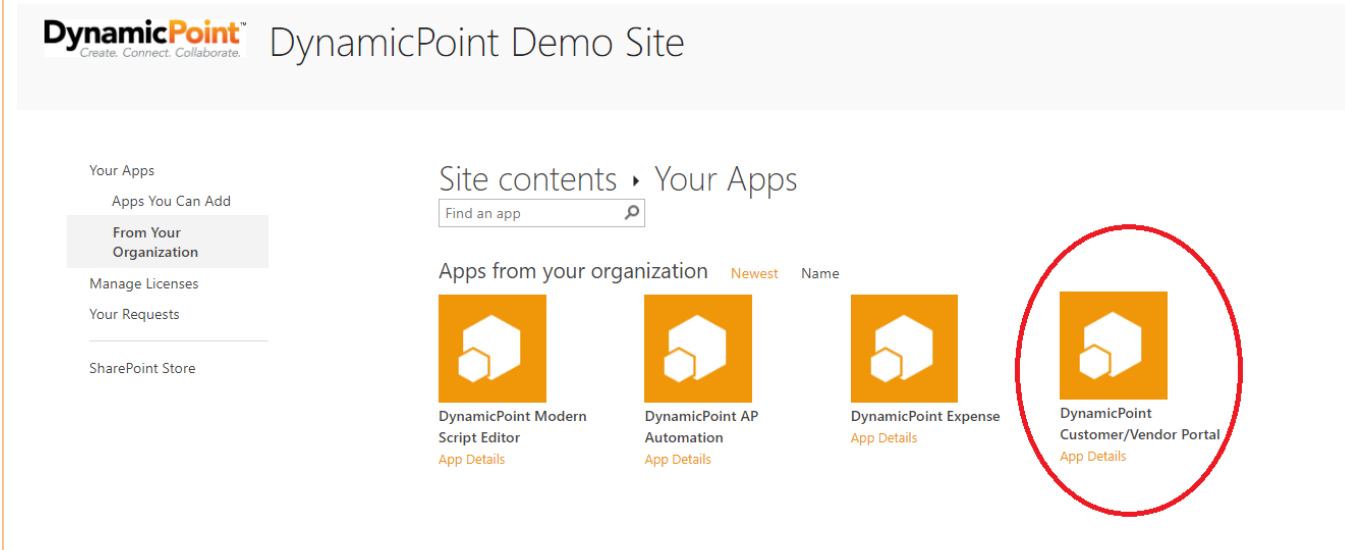| Topic	Narrative
Agenda	Configuring the portal entails the following 5 steps: • Configure Office 365 SharePoint • Install DynamicPoint Portal App • Select Data Objects from the ERP / CRM • Configure Portal Services • Layout Page

5 easy steps

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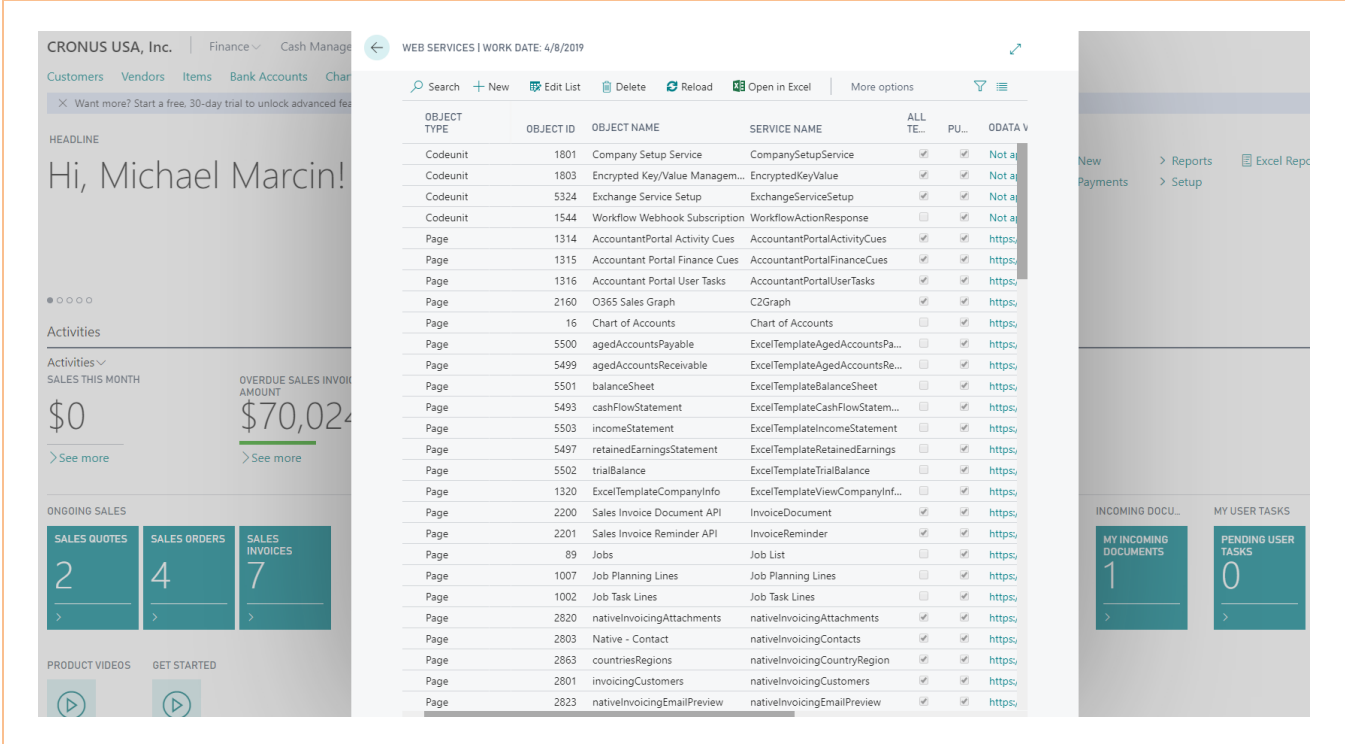4. Configure Portal Services
5. Layout Page

Proprietary Information

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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.

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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.

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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.

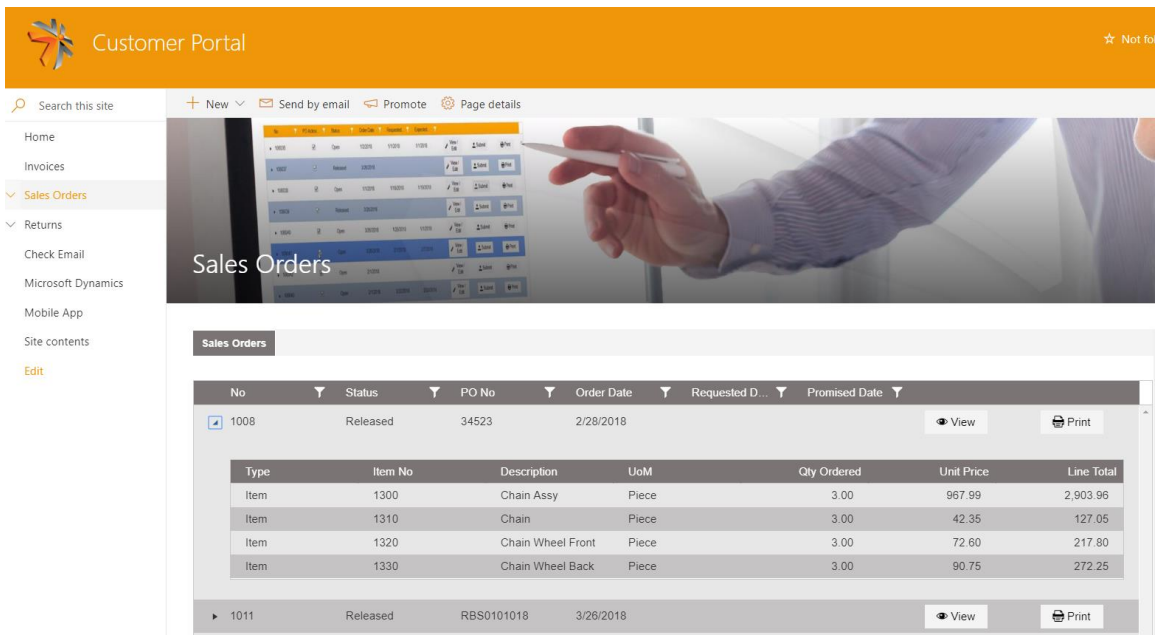| Topic	Narrative
Step 4: Configure the Service App	After obtaining the URL of the data object, the service can be configured in the portal app. The service will determine the fields displayed, parent child relationships, view/edit/create permissions, as well as if we want to include the ability to render any reports in the portal.

Id	Title	Service Base Url	Company/Resource	Def...	Act...	
100	Customer Information	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/CustomerCard	✓	✓	Edit | Details | Delete | Clear cache
101	Contacts	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/Contacts		✓	Edit | Details | Delete | Clear cache
102	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesOrder		✓	Edit | Details | Delete | Clear cache
103	Sales Returns	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesReturnOrder		✓	Edit | Details | Delete | Clear cache
104	Create/Edit Return Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesReturnOrder		✓	Edit | Details | Delete | Clear cache
105	Create/Edit Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesOrder		✓	Edit | Details | Delete | Clear cache
106	Open Invoices	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/CustomerLedgerEntries		✓	Edit | Details | Delete | Clear cache
107	Historical Invoices	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/CustomerLedgerEntries		✓	Edit | Details | Delete | Clear cache
145	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesOrder		✓	Edit | Details | Delete | Clear cache
146	Sales Orders	http://var.dynamicpoint.com:7048/DynamicsNAV80/OData/	Company('{0}')/SalesOrder		✓	Edit | Details | Delete | Clear cache
293	Hickman Sales order	http://nav2017.dynamicpoint.com:7048/DynamicsNav100/OData/	Company('{0}')/SalesOrder		✓	Edit | Details | Delete | Clear cache

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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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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.