Portals Training for Dynamics 365

Course Level: 200

Based on each client's unique needs, portals extend CRM for Dynamics 365 across all industries. Portal features include rich content publishing capabilities for various platforms – including mobile devices – in a secure environment. This course will teach installation best practices, as well as portal configuration, CRM integration, and ongoing portal management for external and internal audiences.

At A Glance:
Portals Training for Dynamics 365

Why Enroll?
Learn portal functionality, configuration, and implementation steps.

Who to Enroll?
System Administrators -
Content Authors -
SMEs Interested in Portals -

Key Takeaways
Portal Overview; Configuration; Security; Branding and Design; Liquid Guide; Client-side Development; Extending Portals; Portal Solutions and Integration.

Register
Register for Portal Training today!
Click to Register.

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DYNAMICS 365 UNIVERSITY

About this
Training

Intended Audience

This course is intended for technical architects, developers, and administrators with Dynamics 365 CE administrative and configuration experience. It is not recommended for end users.

Required Prerequisites

To ensure a successful learning experience, it is essential for participants to have certain prerequisites:
- Understanding of the basic concepts of Dynamics 365

Recommended Prerequisites

While not required, recommended prerequisites are *highly* advised to ensure a successful learning experience:
- Understanding of data and relational databases is helpful

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Key
Takeaways

This Training Will Allow You To:

- Understand portal fundamentals, configurations, and security
- Learn portal branding & design
- Understand Liquid guide
- Learn client-side development
- Understand how to extend portals
- Learn about portal solutions & integration

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DAY 1

DAY 2

INTRODUCTION

Getting started with Power Apps Portals
• Overview of Power Apps Portals
• What's New
Provisioning & Maintenance

CONFIGURATION SETTINGS

Configuration Settings
• Power Apps Portals vs. ADX Studio
• Multi-Language Support

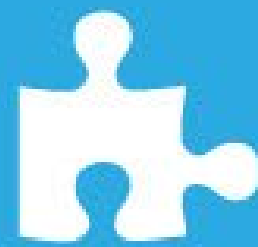## PORTAL SECURITY & ACCESS

Portal Security & Access
• User Registration
• User Authentication
• Web Roles
Content Management

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DAY 1

DAY 2

DISPLAY DATA ON PORTALS

Display Data on Portals
• Entity Forms
• Entity Lists
• Web Forms
Entity Permissions

KNOWLEDGE MANAGEMENT

Knowledge Management
• Content Access
• Product Ownership
• Search Enhancements
Integration with Other Services

CUSTOMIZING PORTALS

Engaging with Communities
Customizing Portals
• Liquid Templating
• Portal Bootstrap Theming

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DYNAMICS 365 UNIVERSITY

DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED