

CRM connect

Power Pages
Getting Started in 45 minutes





Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Hi!

Stuart Starforth
Stuart.Starforth@tecman.co.uk

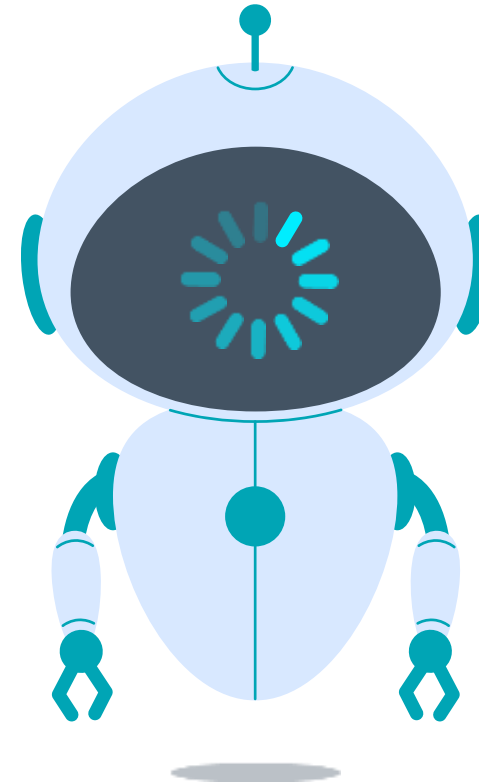
Ellie Nickson
Ellie.Nickson@tecman.co.uk



What we'll cover

Agenda

1. Why Portals? Why Power Pages?
2. What is Power Pages?
3. Key Features
4. Demo: OOB & Custom Portals
5. Starting Your Project: What you need to know
6. Q&A

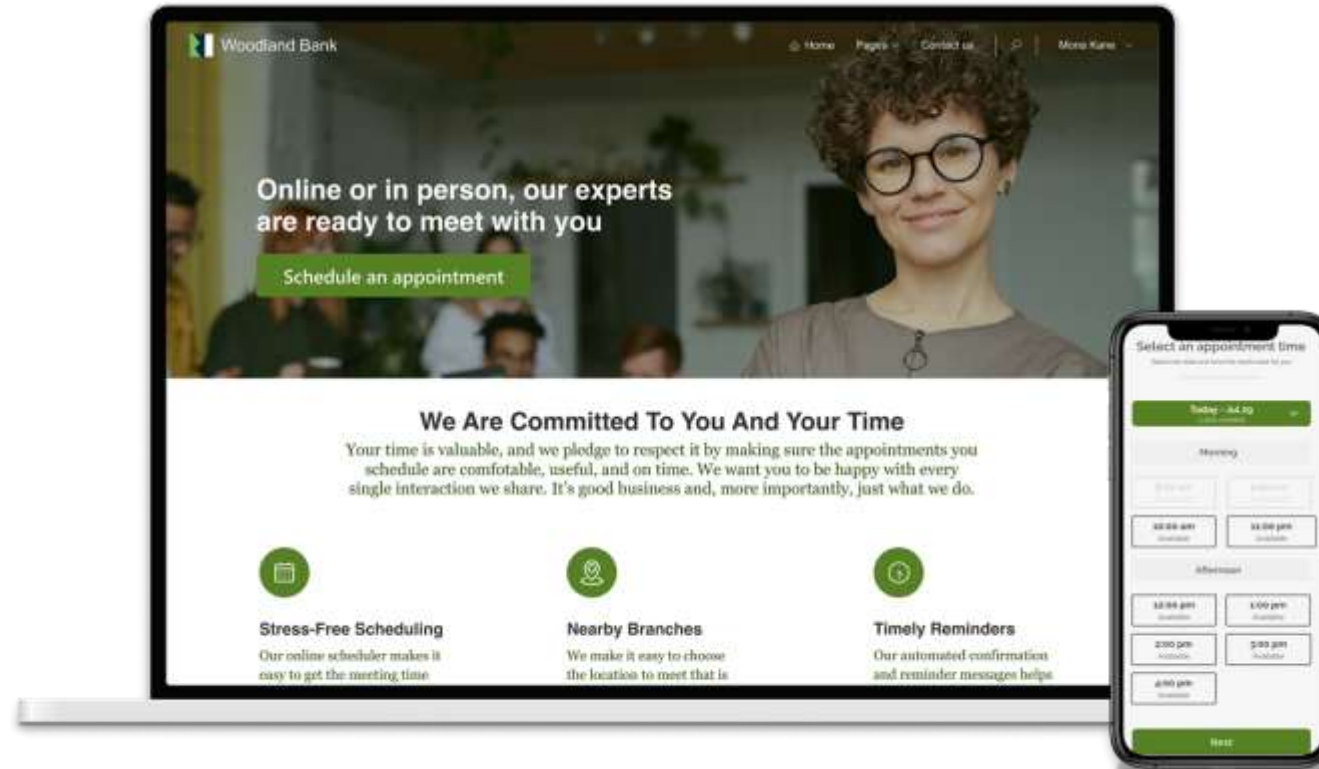


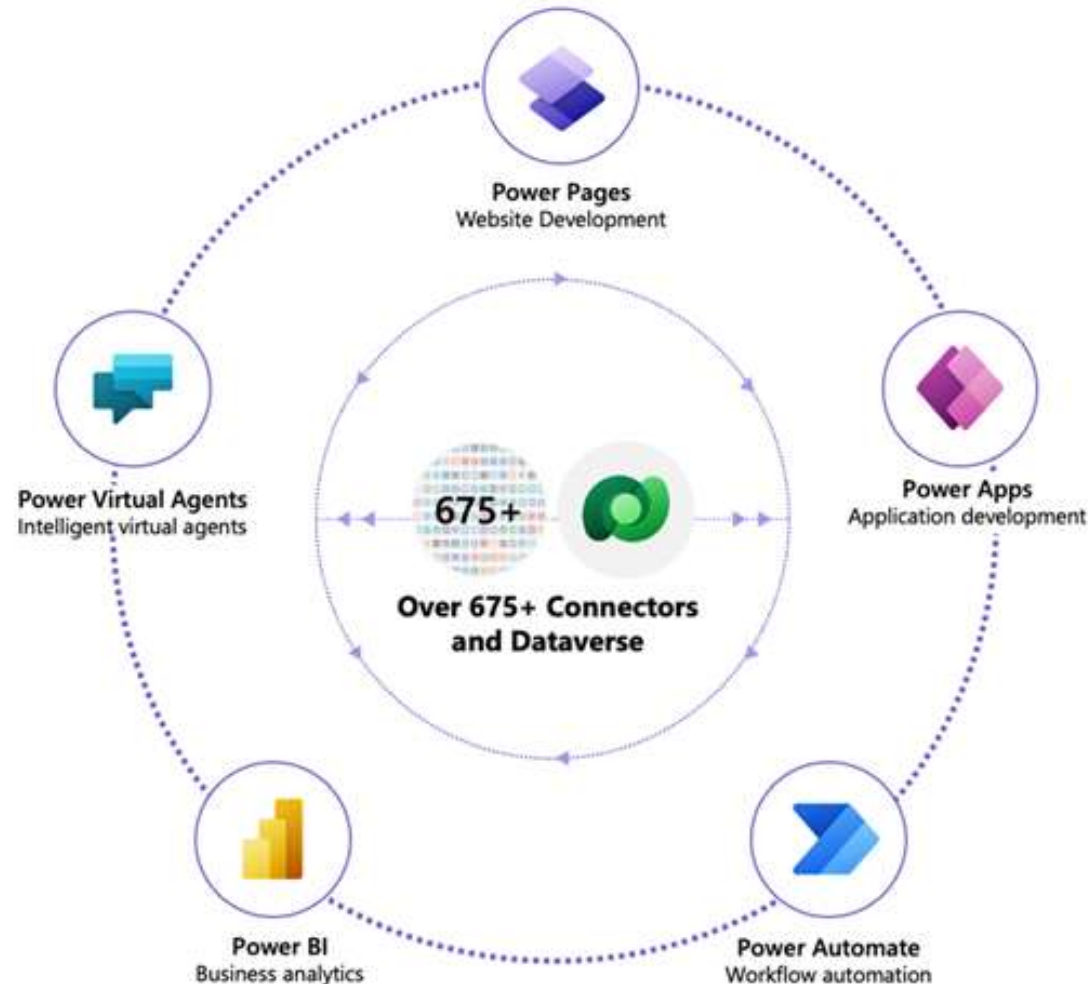


What is Power Pages?

What is Power Pages?

Power Pages is a low-code development and hosting platform that allows users to build secure, data-driven websites with ease.



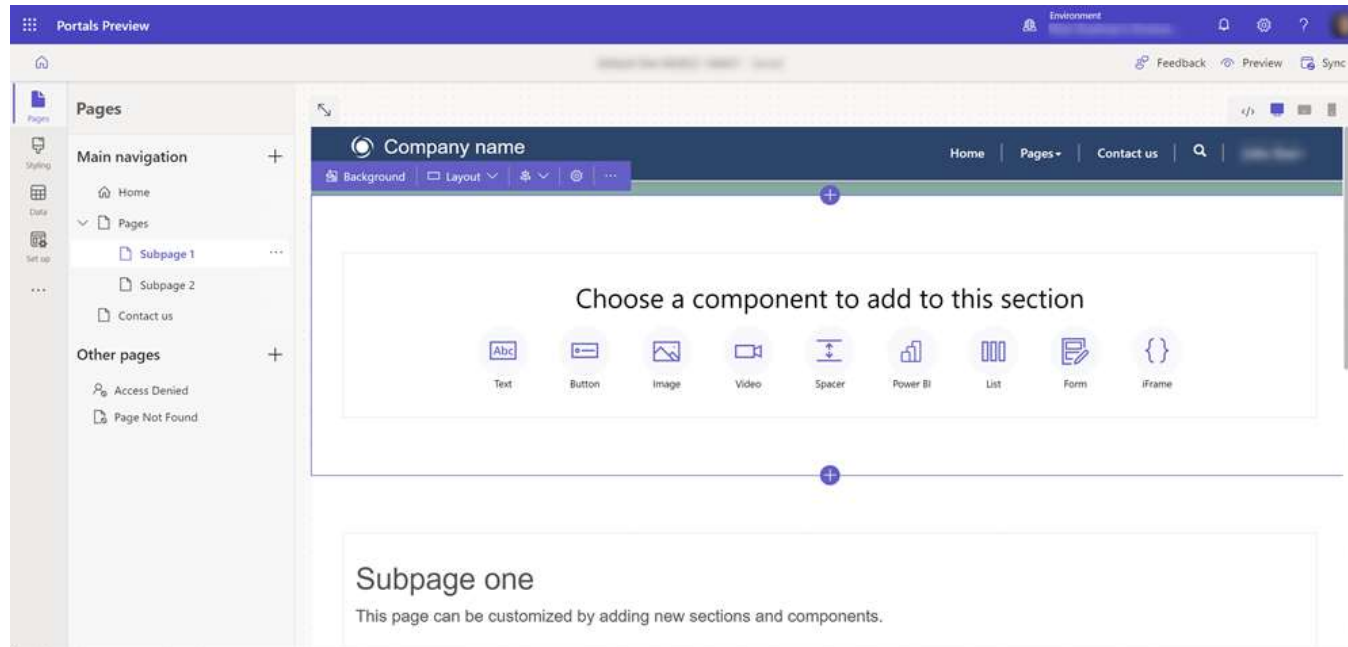


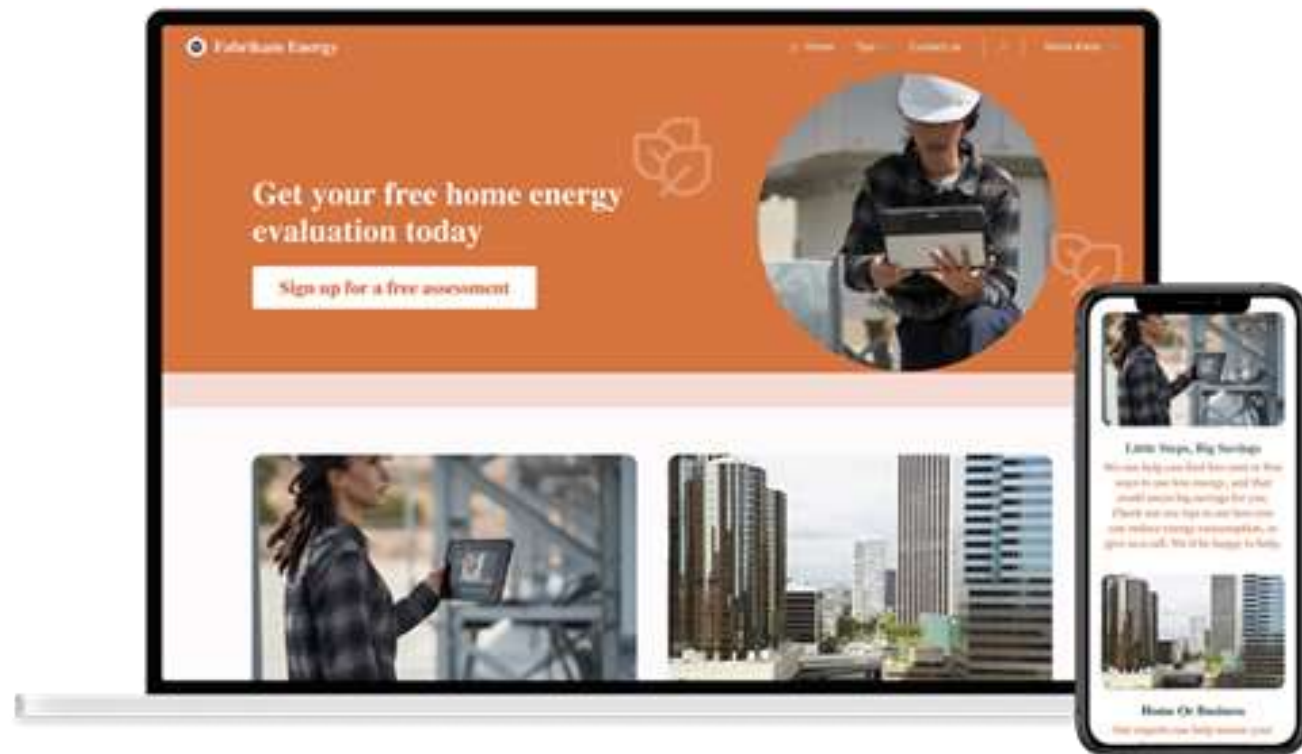
What is Power Pages?

It is part of the Microsoft Power Platform and enables users to design web pages that can integrate directly with Microsoft Dataverse and other external services, making it ideal for business scenarios requiring external-facing websites.

What is Power Pages?

Power Pages provides rich, customizable templates, a fluid visual experience through the design studio



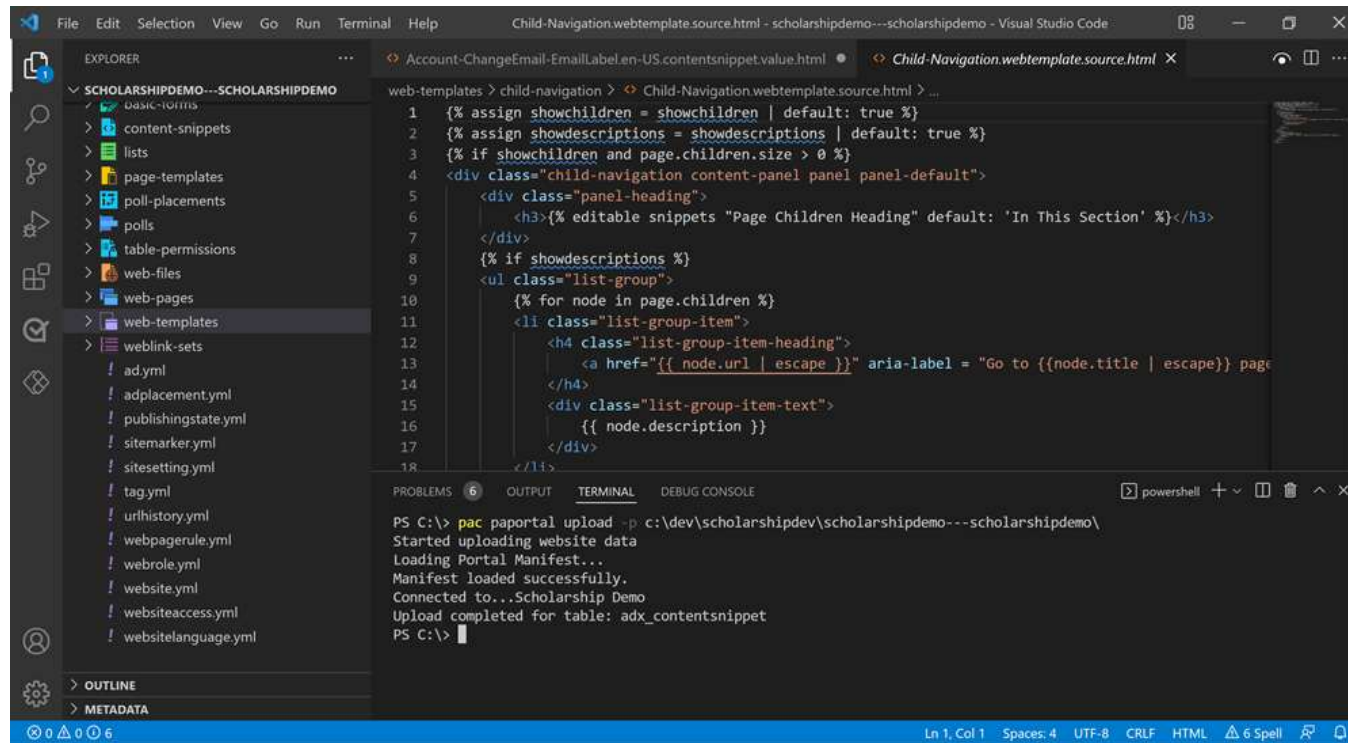


What is Power Pages?

Power Pages is based on Bootstrap, which provides support for building websites that are responsive, mobile-friendly, and available in various form factors.

What is Power Pages?

Makers can work with pro developers in fusion teams to extend the functionality using Visual Studio Code and the Microsoft Power Platform CLI



The screenshot shows the Visual Studio Code interface. The Explorer pane on the left displays a project structure for 'SCHOLARSHIPDEMO---SCHOLARSHIPDEMO' with folders like 'basic-forms', 'content-snippets', 'lists', 'page-templates', 'poll-placements', 'polls', 'table-permissions', 'web-files', 'web-pages', 'web-templates', 'weblink-sets', and various YAML files. The main editor area shows the file 'Child-Navigation.webtemplate.source.html' with the following content:

```
1 {% assign showchildren = showchildren | default: true %}
2 {% assign showdescriptions = showdescriptions | default: true %}
3 {% if showchildren and page.children.size > 0 %}
4 <div class="child-navigation content-panel panel panel-default">
5   <div class="panel-heading">
6     <h3>{% editable snippets "Page Children Heading" default: 'In This Section' %}</h3>
7   </div>
8   {% if showdescriptions %}
9   <ul class="list-group">
10     {% for node in page.children %}
11     <li class="list-group-item">
12       <h4 class="list-group-item-heading">
13         <a href="{{ node.url | escape }}" aria-label = "Go to {{node.title | escape}} page">
14       </h4>
15       <div class="list-group-item-text">
16         {{ node.description }}
17       </div>
18     </li>
19   </ul>
20 </div>
```

The bottom panel shows the TERMINAL with the following output:

```
PS C:\> pac paportal upload -p c:\dev\scholarshipdev\scholarshipdemo---scholarshipdemo\
Started uploading website data
Loading Portal Manifest...
Manifest loaded successfully.
Connected to...Scholarship Demo
Upload completed for table: adx_contentsnippet
PS C:\>
```



Why Portals? Why Power Pages?

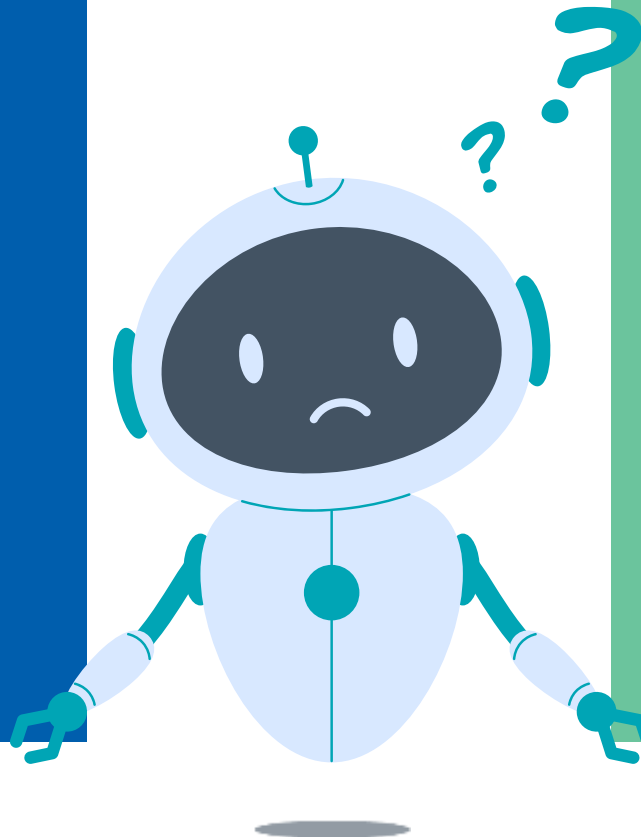
Why Portals & Why Power Pages?

Business Needs

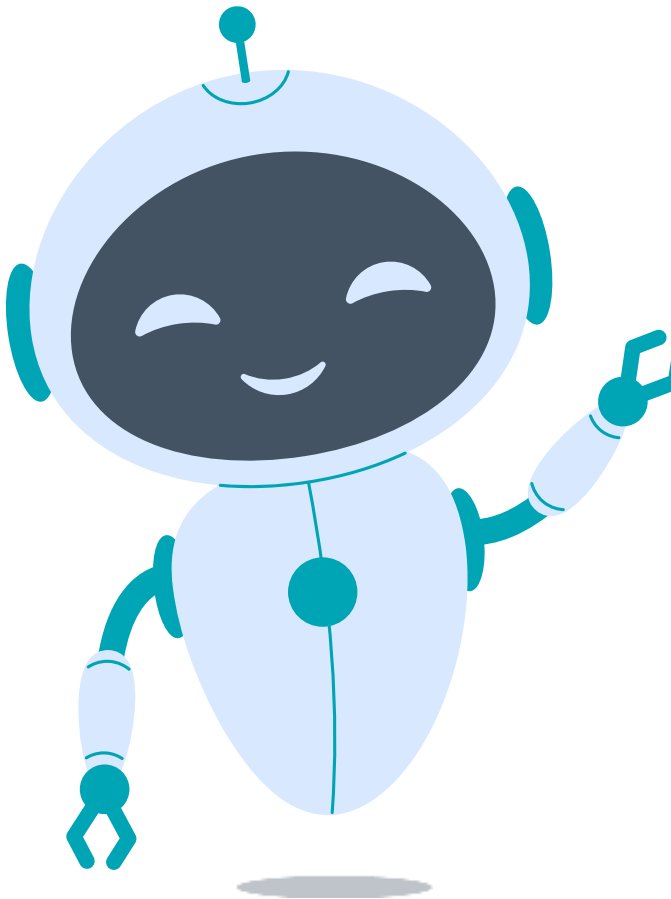
- Supplier Access
- Customer Self-Service
- Partners Portals

Traditional Challenges

- Security
- Integration
- Cost of Custom Development



Why Portals? Why Power Pages?



Many businesses need to securely share data with external users — like customers, suppliers, or partners — but traditional websites don't connect easily to your internal systems, and custom development can be slow and expensive.

Power Pages solves this by offering a secure, low-code way to build external-facing portals that connect directly to your Dataverse data — with full control over access, branding, and user experience.



Key Features & Use cases

Key Features & Use Cases

Key Features:

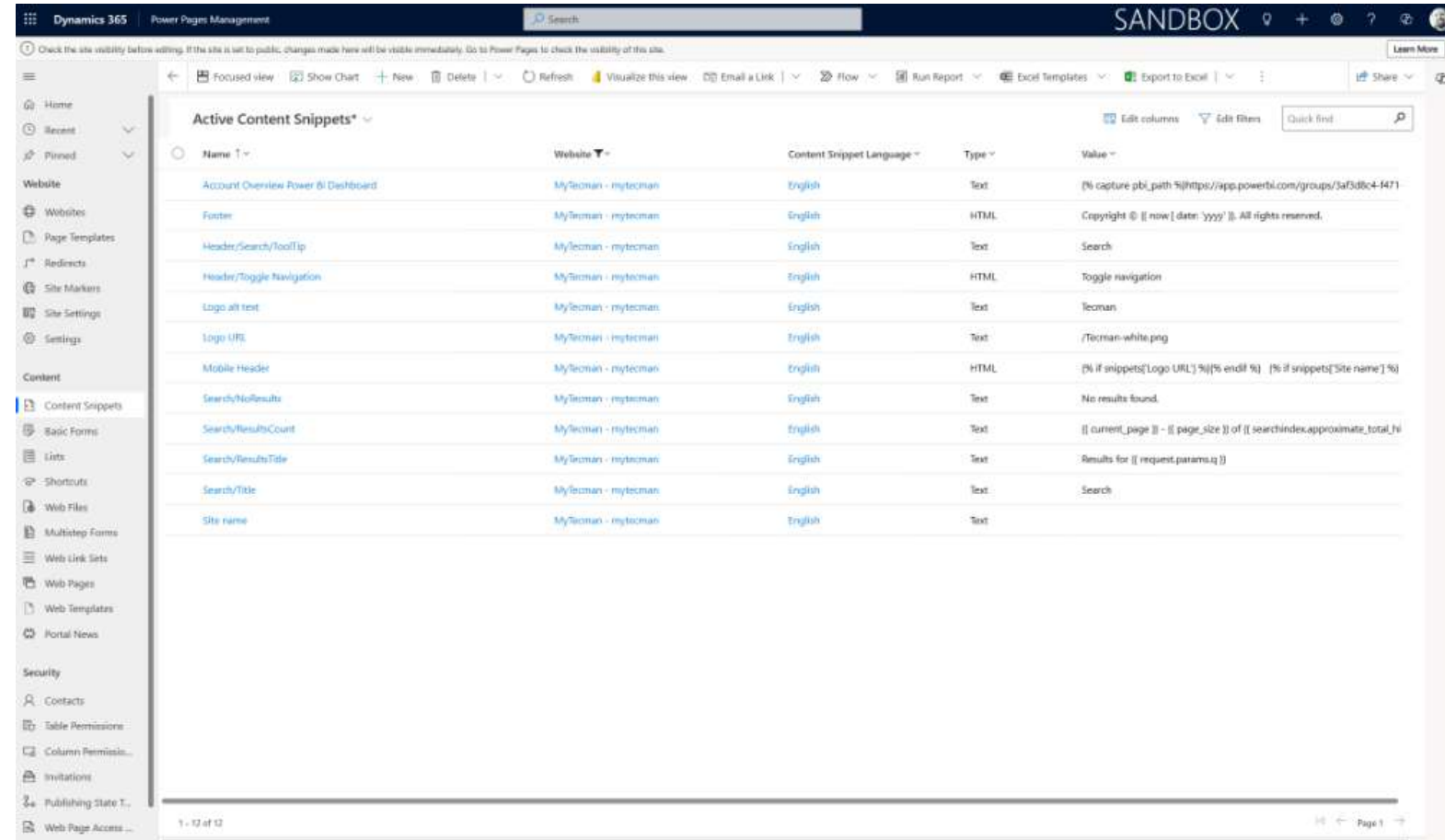
- Site Designer: Add pages, forms, text, media with drag-and-drop tools
- Forms & Lists: Direct Dataverse integration
- Security: Web Roles, Table Permissions, granular control
- Automation: Use Power Automate to trigger workflows (e.g., email confirmations)
- Power BI: Embed reports/dashboards

Use Cases:

- Customer Service Portals (support cases, knowledge base)
- Supplier Portals (document sharing, compliance)
- Partner Portals (sales enablement, lead submission)
- Event Registration / Application Sites

Content Snippets

- Reusable code that can be used throughout your portal
- Time saving feature – updates handled in one place
- Boosts consistency across pages
- Can be configured to support multiple languages



The screenshot displays the Dynamics 365 Power Pages Management interface. The left sidebar shows navigation options like Home, Recent, Pinned, Website, Websites, Page Templates, Redirects, Site Markers, Site Settings, Settings, Content, Content Snippets, Basic Forms, Lists, Shortcuts, Web Files, Multistep Forms, Web Link Sets, Web Pages, Web Templates, Portal News, Security, Contacts, Table Permissions, Column Permissions, Invitations, Publishing State, and Web Page Access. The main area is titled 'Active Content Snippets' and contains a table with the following columns: Name, Website, Content Snippet Language, Type, and Value. The table lists various snippets such as 'Account Overview Power BI Dashboard', 'Footer', 'Header/Search/Tooltip', 'Header/Toggle Navigation', 'Logo alt text', 'Logo URL', 'Mobile Header', 'Search/NoResults', 'Search/ResultsCount', 'Search/ResultsTitle', 'Search/Title', and 'Site name'. Each snippet is associated with the 'MyTecman - mytecman' website and the 'English' language. The 'Value' column contains specific code or content for each snippet, such as a Power BI dashboard path, copyright text, search functionality, and logo URLs.

Name	Website	Content Snippet Language	Type	Value
Account Overview Power BI Dashboard	MyTecman - mytecman	English	Text	{% capture pbi_path %}https://app.powerbi.com/groups/3af3d8c4-1471
Footer	MyTecman - mytecman	English	HTML	Copyright © {{ now date: 'yyyy' }}. All rights reserved.
Header/Search/Tooltip	MyTecman - mytecman	English	Text	Search
Header/Toggle Navigation	MyTecman - mytecman	English	HTML	Toggle navigation
Logo alt text	MyTecman - mytecman	English	Text	Tecman
Logo URL	MyTecman - mytecman	English	Text	/Tecman-white.png
Mobile Header	MyTecman - mytecman	English	HTML	{% if snippets['Logo URL'] %}{% endif %} {% if snippets['Site name'] %}
Search/NoResults	MyTecman - mytecman	English	Text	No results found.
Search/ResultsCount	MyTecman - mytecman	English	Text	{{ current_page }} - {{ page_size }} of {{ searchindex.approximate_total_hi
Search/ResultsTitle	MyTecman - mytecman	English	Text	Results for {{ request.params.q }}
Search/Title	MyTecman - mytecman	English	Text	Search
Site name	MyTecman - mytecman	English	Text	

Content Snippets

Account Overview Power Bi Dashboard - Saved

Content Snippet


General Related ▾

Name * Account Overview Power Bi Dashboard

Website *  MyTecman - mytecman

Display Name Account Overview Power Bi Dashboard

Type Text

Content Snippet Language  English

Value * `{% capture pbi_path %}https://app.powerbi.com/groups/3af3d8c4-f471-489a-85d5-625df0e80439/reports/882ecc22-6ad2-4028-816d-c6770ab3e49c/ReportSection?filter=Case/tecman_account eq '{{user.parentcustomerid.id}}' {% endcapture %} {% powerbi authentication_type:"powerbiembedded" path:pbi_path %}`

Site Settings

- Configurable settings used to modify behaviour / visuals.
- More user friendly – no need to modify code
- Can be either global or site specific

MyTecman - mytecman - Saved Website

General Root Pages Child Pages Lists Basic Forms Multistep Forms Site Settings Site Markers Page Templates Website Access Permissions Related

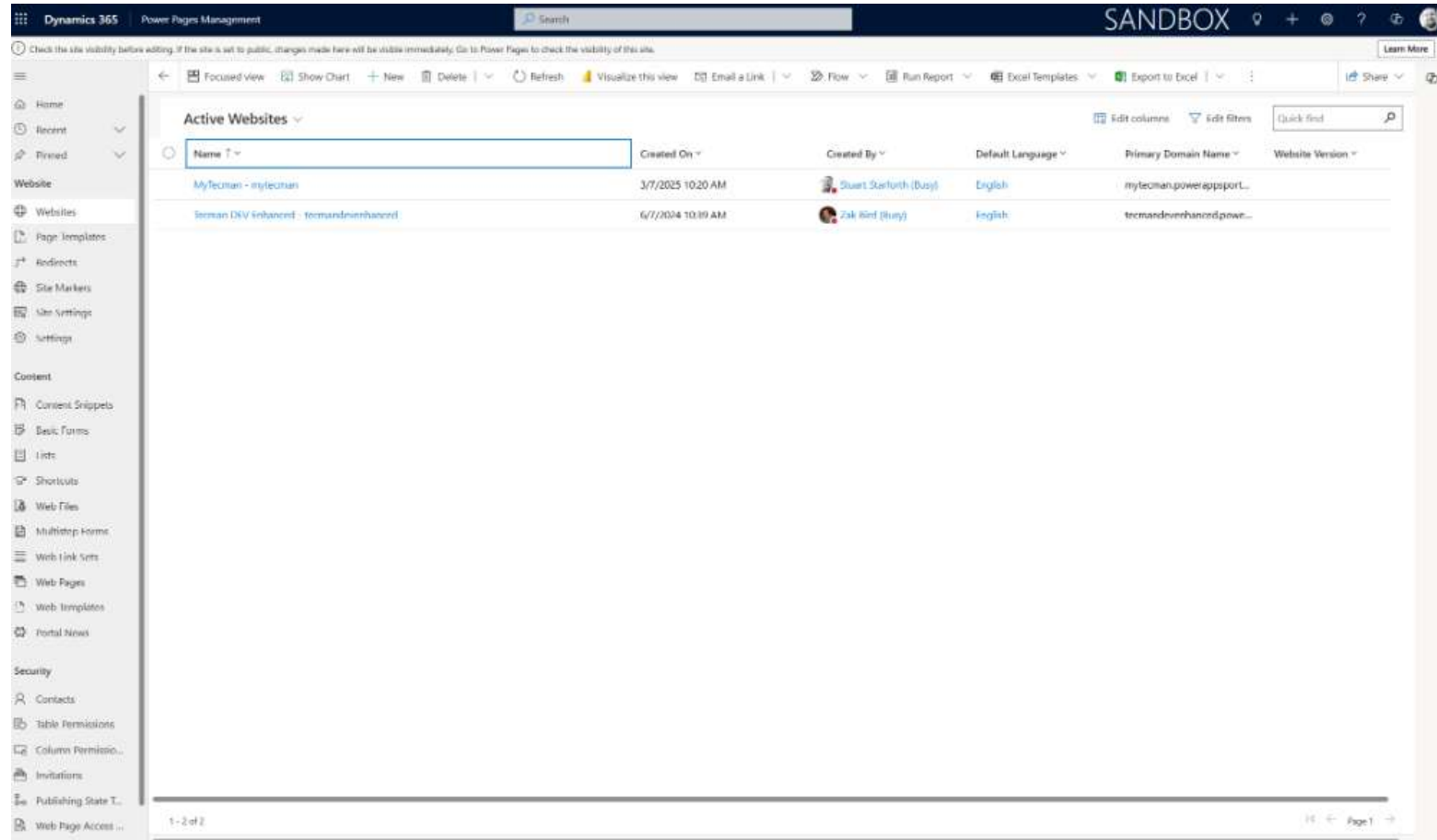
+ New Site Setting Refresh Flow Run Report

Quick find

Name	Value	Website
Authentication/LoginThrottling/IpAddressTimeoutTimeSpan	00:10:00	MyTecman - mytecman
Authentication/LoginThrottling/MaxAttemptsTimeLimitTimeSpan	00:03:00	MyTecman - mytecman
Authentication/LoginThrottling/MaxInvalidAttemptsFromIpAddress	1000	MyTecman - mytecman
Authentication/LoginTrackingEnabled	true	MyTecman - mytecman
Authentication/OpenIdConnect/AzureAD/Caption	Microsoft Entra ID	MyTecman - mytecman
Authentication/OpenIdConnect/AzureAD/RebrandDisclaimerEnabled	false	MyTecman - mytecman
Authentication/Registration/AzureADLoginEnabled	false	MyTecman - mytecman
Authentication/Registration/DenyMinors	false	MyTecman - mytecman
Authentication/Registration/DenyMinorsWithoutParentalConsent	false	MyTecman - mytecman
Authentication/Registration/EmailConfirmationEnabled	true	MyTecman - mytecman

1 - 10 of 48 Page 1

Multiple Portals



The screenshot displays the Dynamics 365 Power Pages Management interface. The top navigation bar includes 'Dynamics 365', 'Power Pages Management', a search bar, and a 'SANDBOX' environment indicator. A left-hand navigation pane lists various management options such as Home, Recent, Pinned, Websites, Page Templates, Redirects, Site Markers, Site Settings, Settings, Content, Content Snippets, Basic Forms, Lists, Shortcuts, Web Files, Multistep Forms, Web Link Sets, Web Pages, Web Templates, Portal News, Security, Contacts, Table Permissions, Column Permissions, Invitations, Publishing State, and Web Page Access. The main content area is titled 'Active Websites' and contains a table with the following data:

Name	Created On	Created By	Default Language	Primary Domain Name	Website Version
MyTecman - mytecman	3/7/2025 10:20 AM	Stuart Skarforth (Busy)	English	mytecman.powerappsport...	
Tecman DNV enhanced - tecmandneenhanced	6/7/2024 10:39 AM	Zak Bird (Busy)	English	tecmandneenhanced.powe...	

The table includes interactive elements like 'Edit column' and 'Edit filters' buttons, and a 'Quick find' search bar. The bottom status bar indicates '1 - 2 of 2' records and 'Page 1'.

Form Creation

- Surfaces OTTB 'CRM' & custom forms configured in make.powerapps.com
- Configure how your audience will use your form – create / update / read

Customer Service - Create Case - Saved

Basic Form

General Form Options On Success Settings Additional Settings Associated Table Reference Basic Form Metadata Related ▾

Name	* Customer Service - Create Case	
Table Name	* incident	Case (incident) ▾
Form Name	* Web - Create Case	Web - Create Case ▾
Tab Name	general	General ▾
Mode	Insert	
Website	* MyTecman - mytecman	

Enable Table Permissions ☒

Handy Tools – Site Checker

The screenshot displays the MyTecman Site Checker interface. The top navigation bar includes 'Power Pages' and 'MyTecman - Public - Saved'. The left sidebar shows a 'Set up' menu with options like 'General', 'Site details', 'Go live checklist', 'Site performance', 'Mobile', 'Progressive web application', 'Integrations', 'Cloud flows', 'External apps (preview)', 'Copilot', 'Site search (preview)', and 'Add copilot'. The main content area features a blue banner about security settings moving to a new workspace. Below this, the 'Site details' section shows a security configuration check with a green progress bar indicating '5/8 site checks passed'. A table below provides details about the site, including its name, owner, creation/modification dates, type, language, URL, application ID, early upgrade status, and data model.

Name	Owner	Created on	Modified on
MyTecman	Stuart Starforth	07/03/2025, 10:36:34	19/04/2025, 10:26:20

Type	Language	URL
Trial (28 days) Convert	English	mytecman-ual.powerappsportals.com

Application ID	Early upgrade	Data Model
12e143a4-d75e-40e0-9858-1777702bd9e4	Disabled Manage	Enhanced

Handy Tools – Site Scan

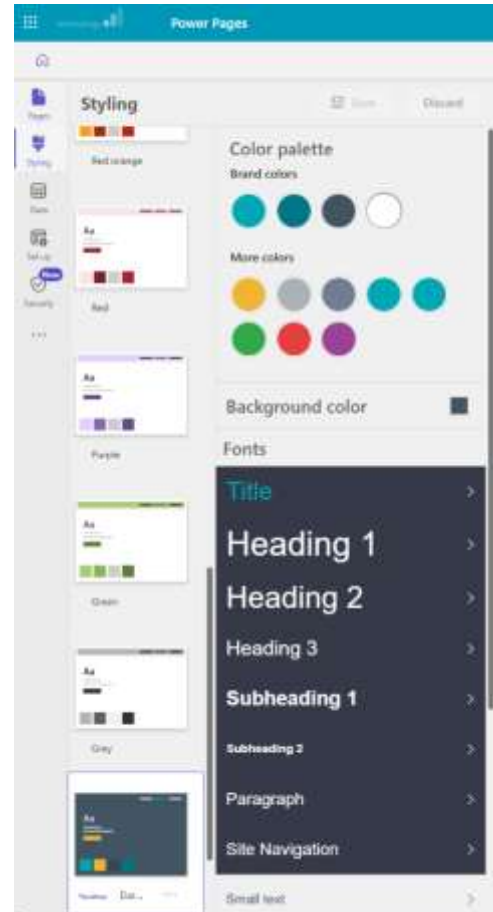
- Provides site security strength insights
- Identifies potential issues or risks
- Offers recommended actions to improve security health

The screenshot displays the 'Power Pages' interface for a site named 'Mytecman - Public - Saved'. The left sidebar shows a 'Security' section with options like 'Monitor', 'Protect', and 'Manage'. The main content area is titled 'Run scan (preview)' and shows a 'Security scan result' for 31/37 checks passed. A table lists 13 security checks with their status and recommendations.

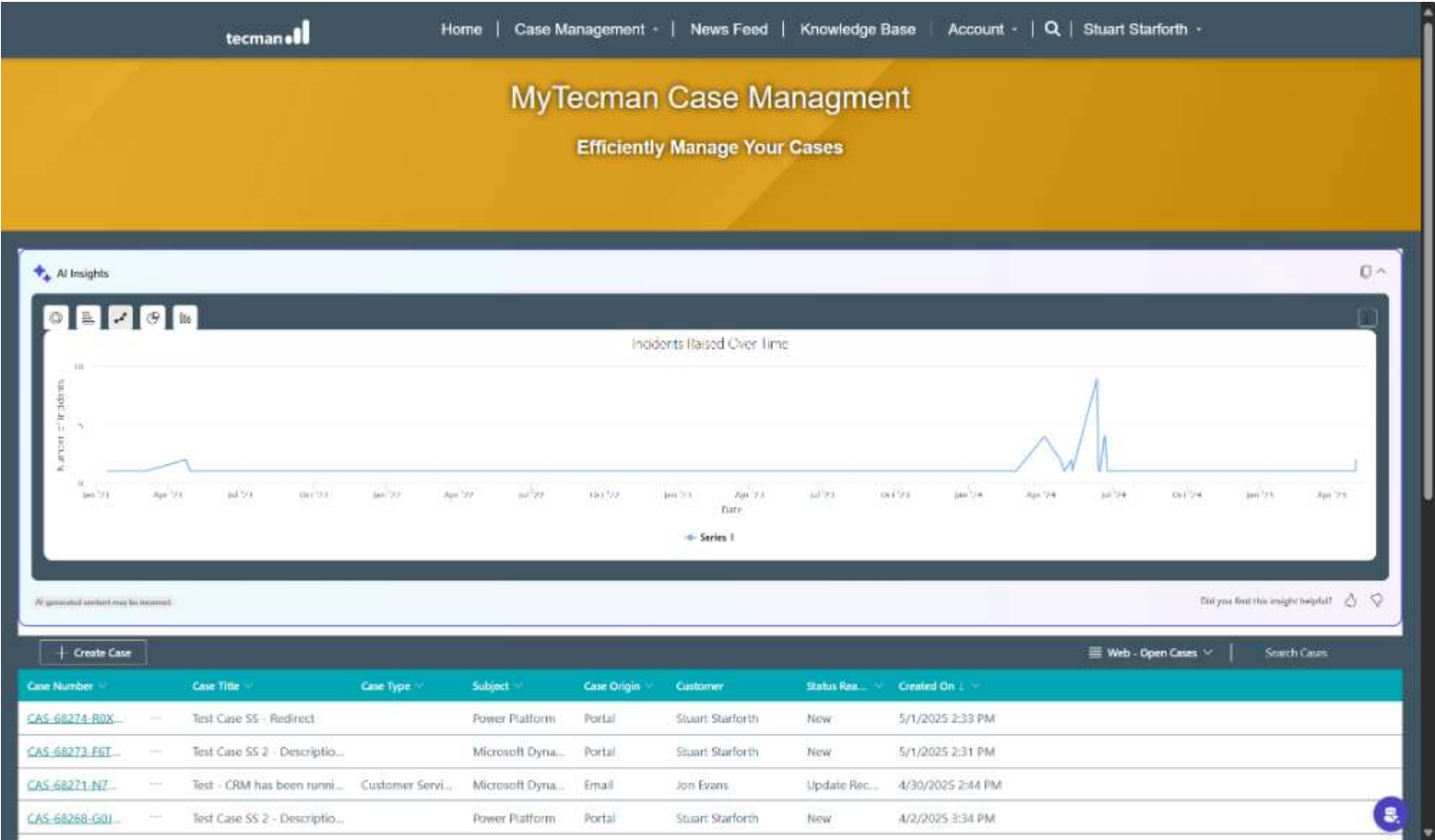
Security Check	Status	Recommendation
Anti-clickjacking Header	Failed	Fix 1 alert
Content Security Policy (CSP) Header Not Set	Failed	Fix 1 alert
Cross-Domain JavaScript Source File Inclusion	Failed	Fix 1 alert
Cookie Without Secure Flag	Failed	Fix 1 alert
X-Content-Type-Options Header Missing	Failed	Fix 1 alert
Application Error Disclosure	Failed	Fix 1 alert
Trace.asx Information Leak	Passed	No action required
ELMAH Information Leak	Passed	No action required
CRLF Injection	Passed	No action required
Hidden File Finder	Passed	No action required
Vulnerable JS Library (Powered by Retire.js)	Passed	No action required
Cloud Metadata Potentially Exposed	Passed	No action required

Custom Styling

Customise To Your Branding

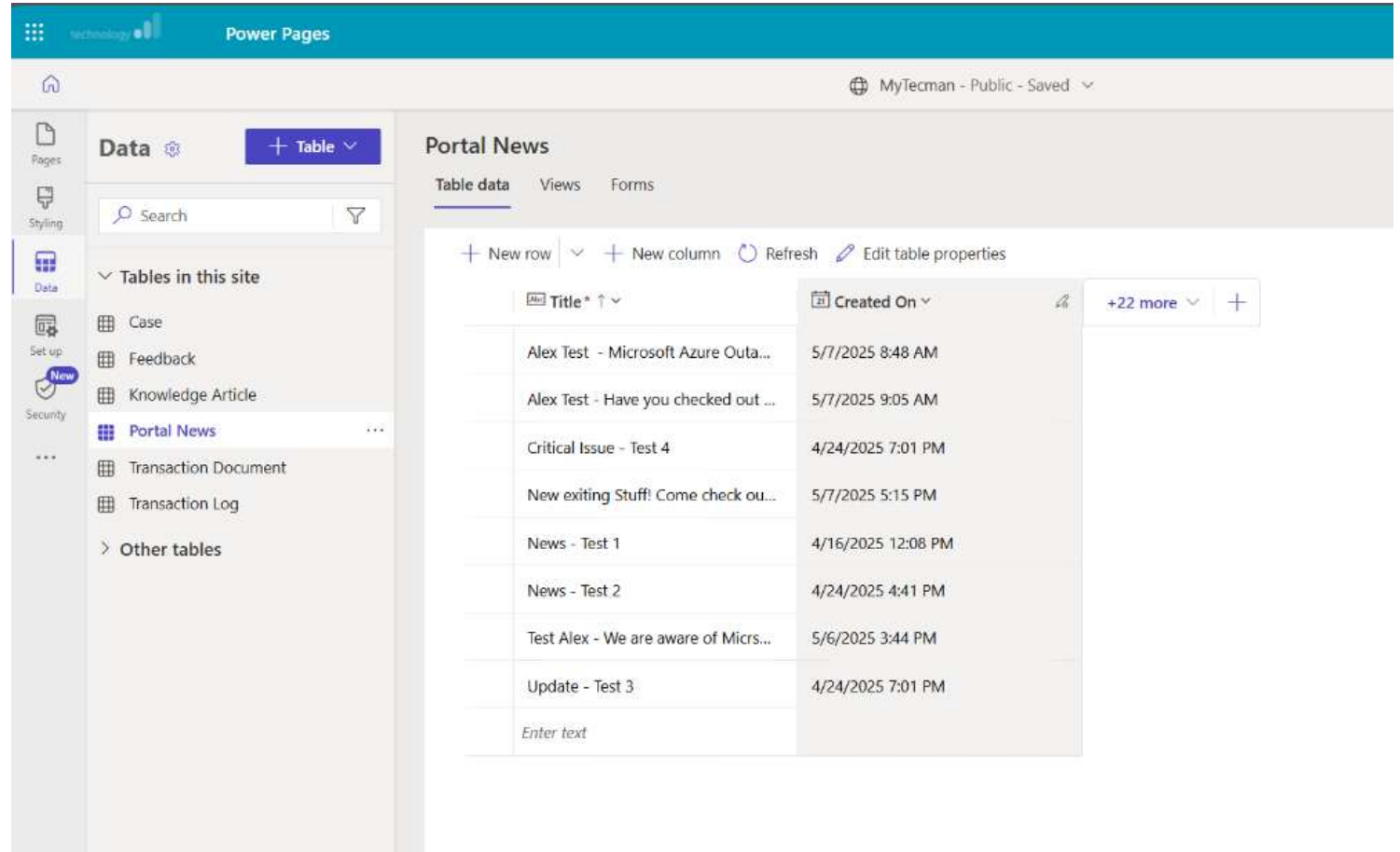


AI Insights



Access Forms, Views and Data Directly

- Native Dataverse integration
- Supports the use of Virtual Tables
 - Business Central data



The screenshot displays the 'Power Pages' interface for a site named 'MyTecman - Public - Saved'. The left sidebar shows navigation options: Pages, Styling, Data, Set up, and Security. The 'Data' section is active, showing a list of tables in the site: Case, Feedback, Knowledge Article, Portal News (highlighted), Transaction Document, and Transaction Log. The main area shows the 'Portal News' table in 'Table data' view. The table has two columns: 'Title' and 'Created On'. The table contains 10 rows of data, including test entries and a real-world example about Microsoft Azure. A '+22 more' link is visible at the bottom right of the table.

Title	Created On
Alex Test - Microsoft Azure Outa...	5/7/2025 8:48 AM
Alex Test - Have you checked out ...	5/7/2025 9:05 AM
Critical Issue - Test 4	4/24/2025 7:01 PM
New exiting Stuff! Come check ou...	5/7/2025 5:15 PM
News - Test 1	4/16/2025 12:08 PM
News - Test 2	4/24/2025 4:41 PM
Test Alex - We are aware of Micrs...	5/6/2025 3:44 PM
Update - Test 3	4/24/2025 7:01 PM
Enter text	

When to Use Power Pages vs. Other Tools

Not every business scenario needs a portal — sometimes a canvas app or model-driven app is better suited.

Here's how Power Pages fits into the Power Platform landscape and when to use it versus other tools:

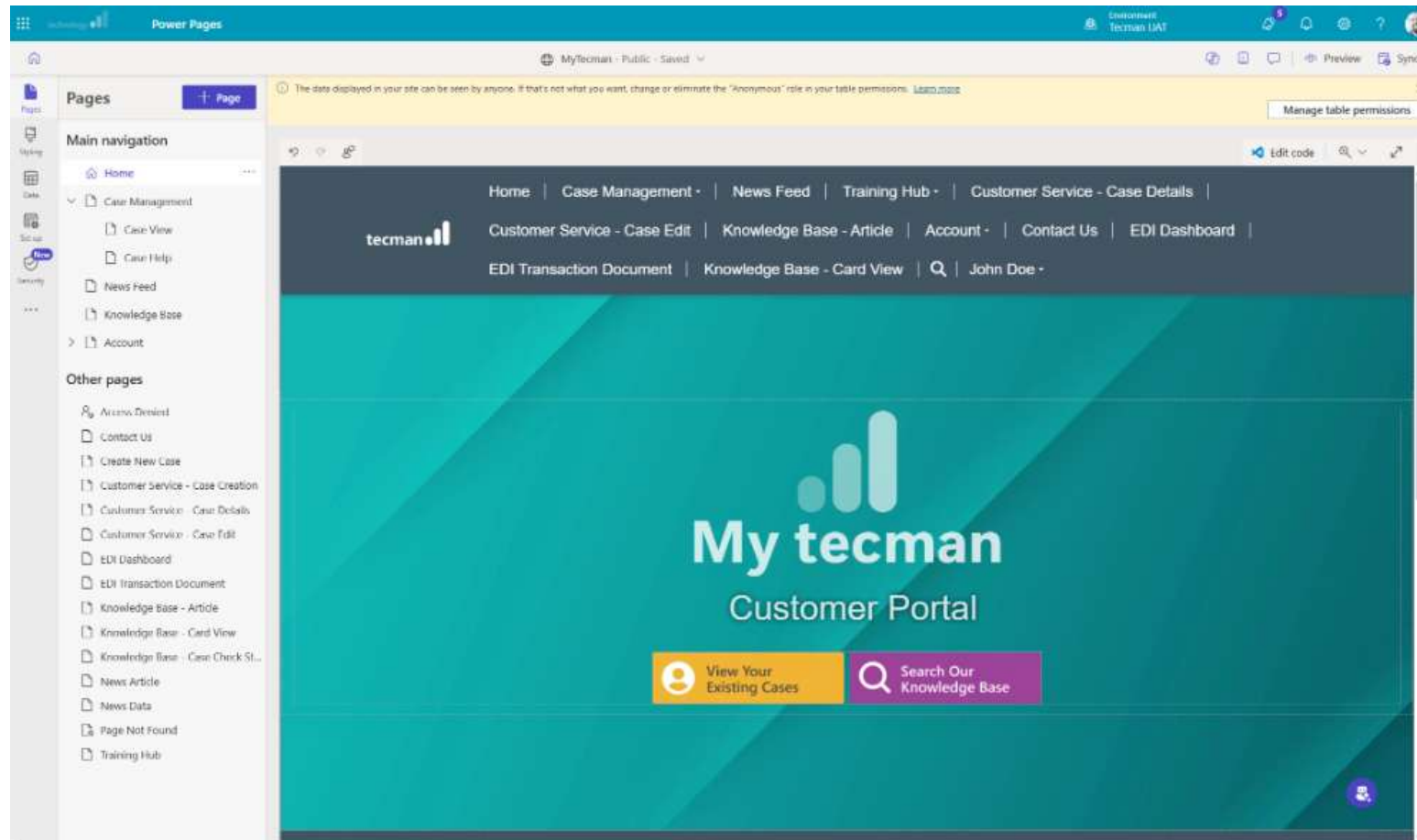
When to Use Power Pages vs. Other Tools

Scenario	Recommended Tool	Why?
Internal employee access to data	Model-Driven App / Canvas App	Designed for authenticated, licensed internal users
External access to CRM/ERP data (secure access)	Power Pages	Built specifically for authenticated access by external users
Anonymous form submissions (e.g., Contact Us)	Power Pages	Supports public access with optional authentication
Public-facing marketing website	CMS (e.g., WordPress, Wix)	Better suited for design flexibility and SEO
Lightweight data collection from customers	Power Pages	Connects directly to Dataverse, supports workflows
Heavy visual design, advanced branding required	Custom Web Dev	Use custom HTML/CSS for maximum design control



Your Portal, Your Way

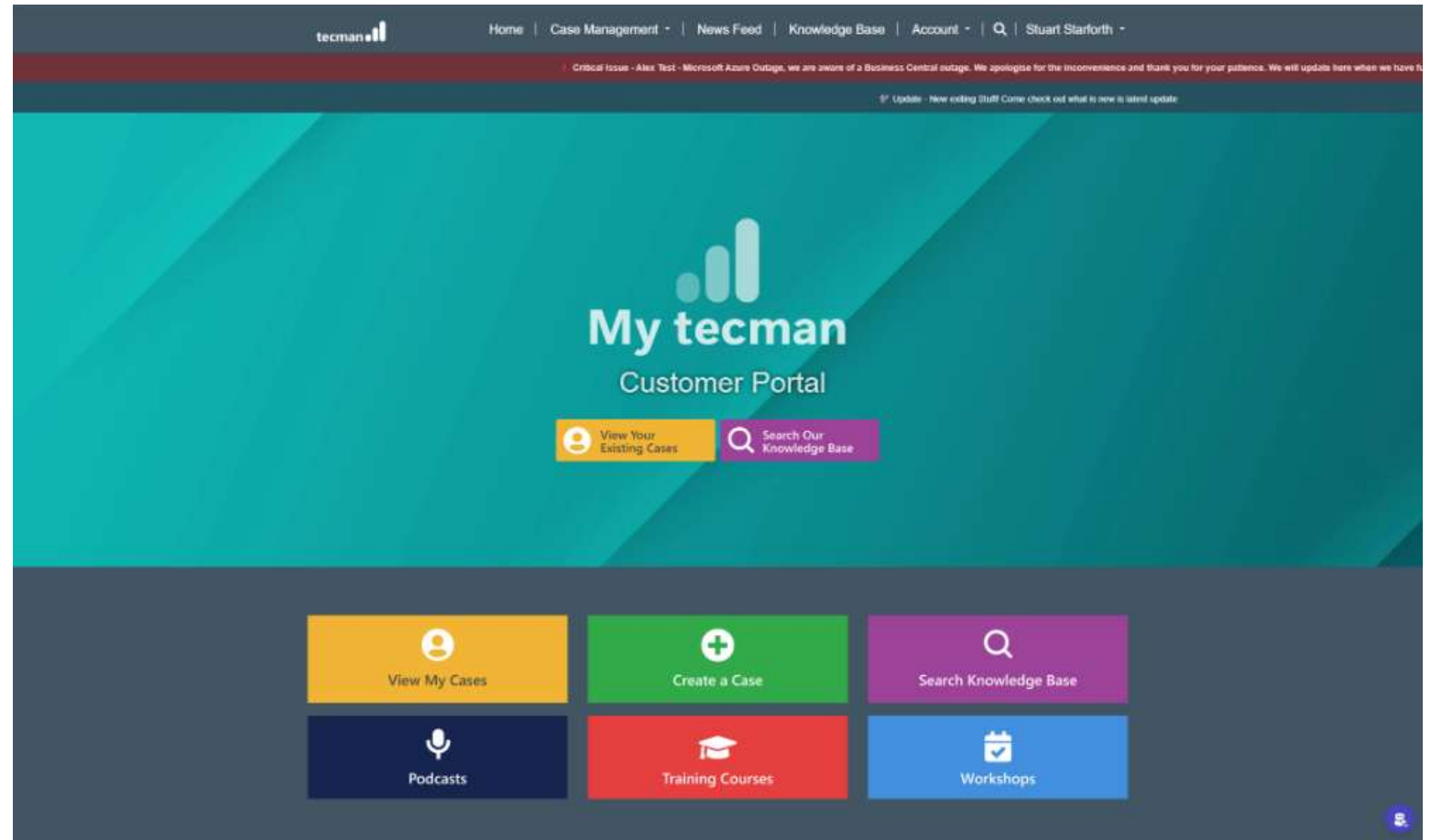
Your Portal, Your Way



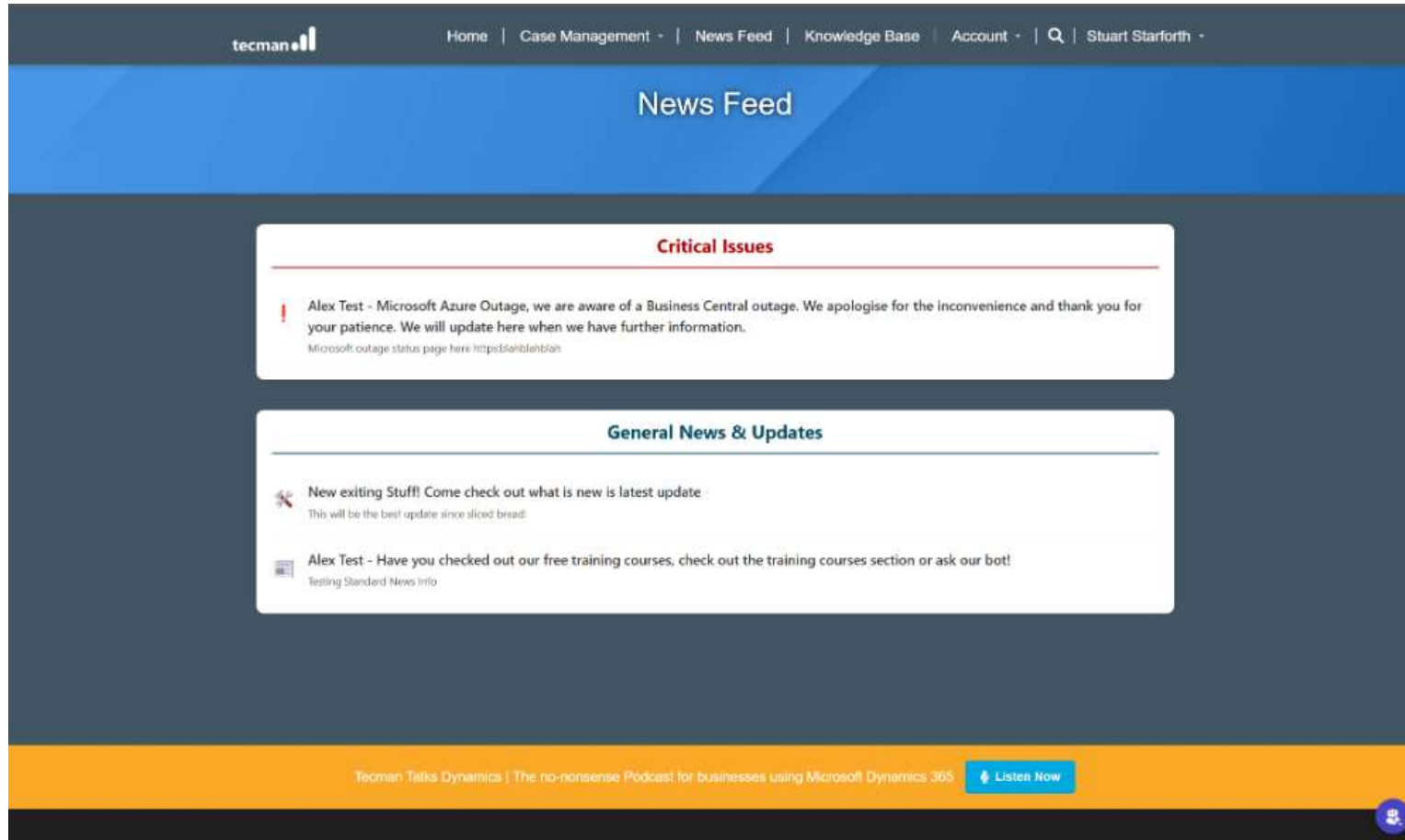
Custom Banner

By using certain code snippets, you can showcase data stored in the Dataverse directly within a custom content blocks.

Here we are pulling News directly into the home page.



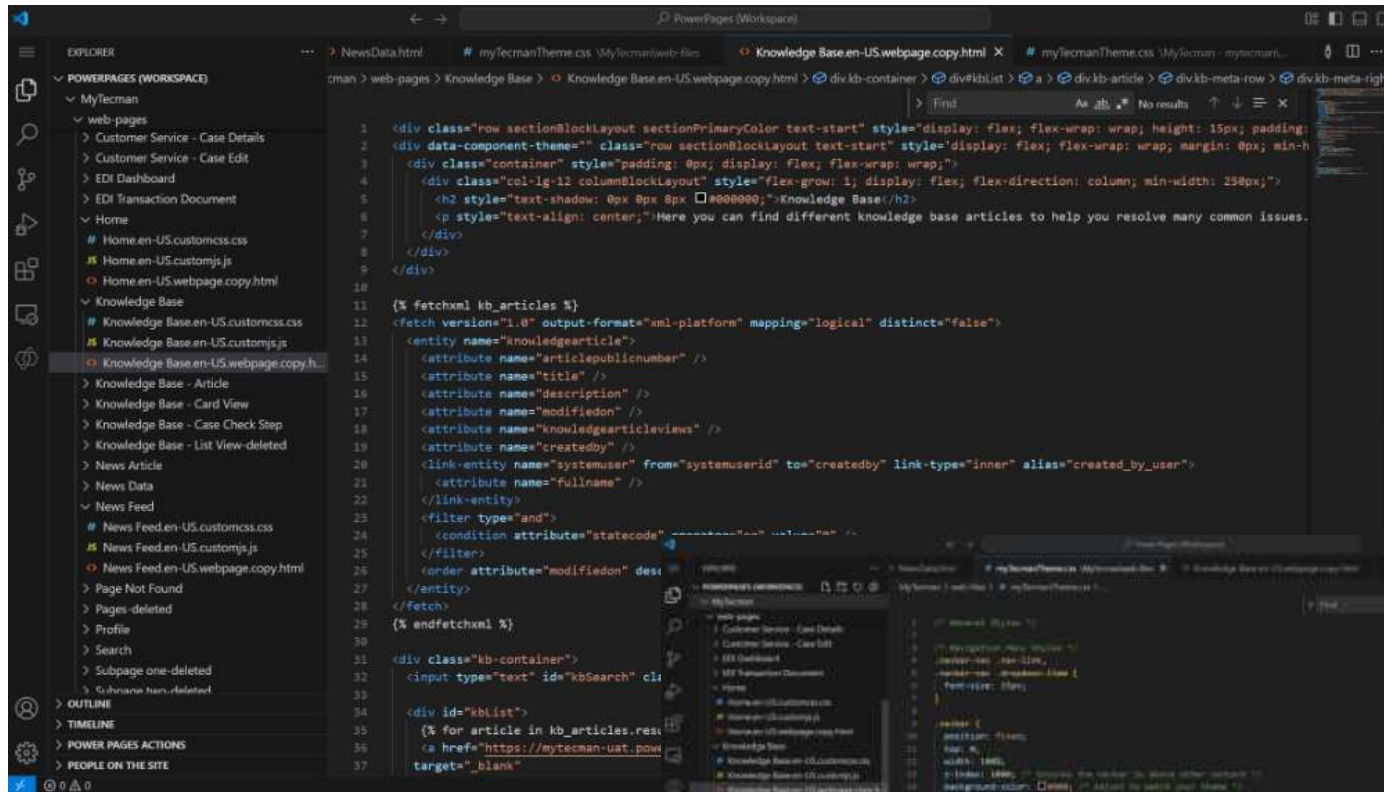
Banner Links to News Feed Page



This banner links to a custom News Feed page that displays articles from a CRM-based table.

- Pulls real-time data from a custom Dataverse table
- Keeps portal users updated with internal news
- Easy to manage and publish from Dynamics CRM

Customise Your Portal

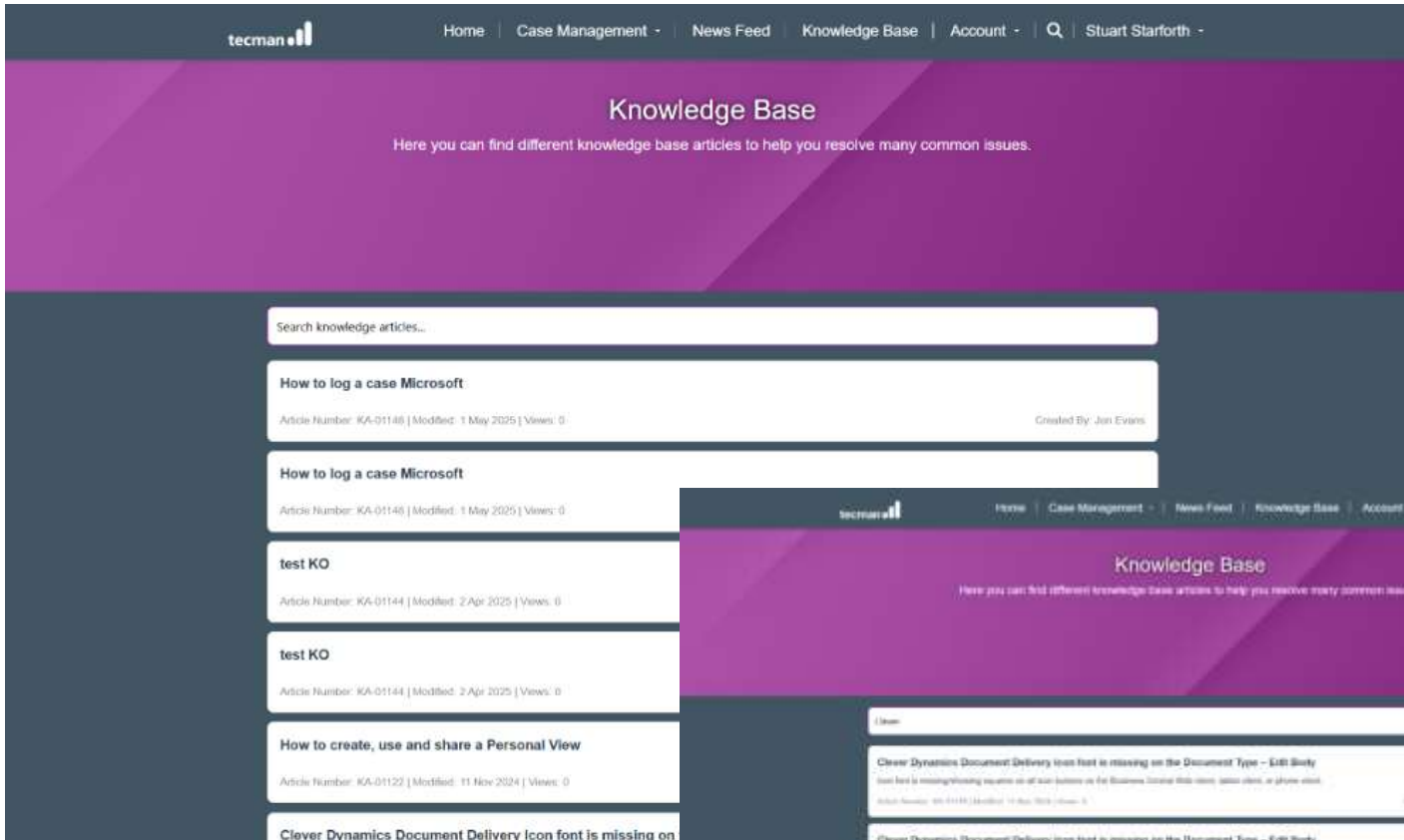


Full control over layout, styling, and logic using:

- HTML for structure
- CSS for branding and layout
- Liquid for dynamic Dataverse data

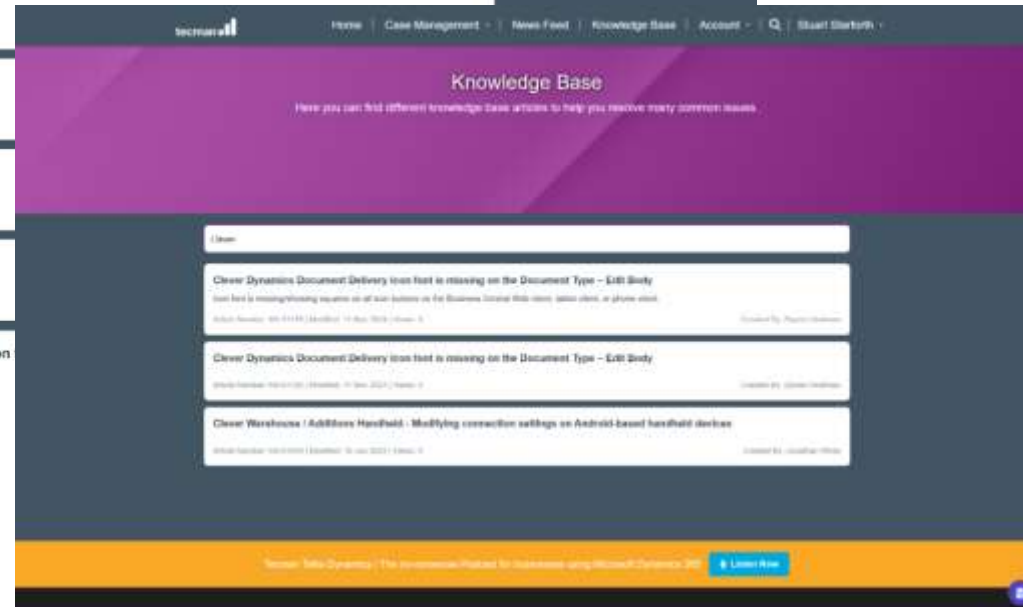
Easily adapt Power Pages to match your website design or business needs.

Customise Your Portal



Users can search and view knowledge articles pulled directly from Dataverse.

- Real-time search using a custom search bar
- Article cards display metadata (author, date, views)
- Fully dynamic and styled to match the portal theme



Use Custom Forms and Data (Dataverse)

The screenshot displays the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, Sales Hub, a search bar, and a 'SANDBOX' environment indicator. The left sidebar contains navigation options: Home, Recent, Filtered, My Work, Copilot, Sales accelerator, Activities, Dashboards, Customers, Accounts, Contacts, Account Plans, Workflows, Project Close Reports, Sales, Leads, Opportunities, Competitors, Service, Cases, Portal News, Sales Analytics, and Sales usage reports. The main content area shows a table titled 'Active Portal News' with columns for News Type, Title, Status Reason, and Created On. The table lists several news items, including updates, critical issues, and drafts. Below the table, a detailed view of a specific news item is shown, including its title, news type, start and end dates, and a rich text editor for the content.

News Type	Title	Status Reason	Created On
Update	New exciting stuff! Come check out what is new in latest update	Live	5/1/2025 4:15 PM
News	Alex Test - Have you checked out our free training courses, check out the training courses section or ask our bot!	Live	5/7/2025 8:05 AM
Critical Issue	Alex Test - Microsoft Azure Outage, we are aware of a Business Central outage. We apologise for the inconvenience...	Live	5/7/2025 7:48 AM
Update	test Alex - We are aware of Microsoft service issues, we are in contact with Microsoft and will provide further update...	Draft	5/6/2025 2:44 PM
Critical Issue	Critical Issue - Test 6	Draft	4/24/2025 6:01 PM
Update	Update - test 4	Draft	4/24/2025 6:01 PM
News	News - test 7	Draft	4/24/2025 6:41 PM
News	News - Test 1	Complete	4/16/2025 11:00 AM

Alex Test - Have you checked out our free training courses, check out the training courses section or ask our bot! Unsound

Portal News - Portal News Article

News Type News

News Start 5/6/2025 8:00 AM **News End** 5/9/2025 8:00 AM

Title Alex Test - Have you checked out our free training courses, check out the training courses section or ask our bot!

News Testing Standard News Info

News Type String News

Use Data from (CRM/Dataverse)

The screenshot displays the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, Sales Hub, a search bar, and a 'SANDBOX' environment indicator. The left sidebar contains navigation options: Home, Recent, Filtered, My Work, Copilot, Sales accelerator, Activities, Dashboards, Customers (Accounts, Contacts, Account Plans, Workflows, Project Close Reports), Sales (Leads, Opportunities, Competitors), Service (Cases), Portal News, Sales Analytics, and Sales usage reports.

The main content area shows a table titled 'Active Portal News'. The table has columns for News Type, Title, Status Reason, and Created On. The data is as follows:

News Type	Title	Status Reason	Created On
Update	New exciting stuff! Come check out what is new in latest update	Live	5/1/2025 4:15 PM
News	Alex Test - Have you checked out our free training courses, check out the training courses section or ask our bot!	Live	5/7/2025 8:05 AM
Critical Issue	Alex Test - Microsoft Azure Outage, we are aware of a Business Central outage. We apologise for the inconvenience...	Live	5/7/2025 7:48 AM
Update	test Alex - We are aware of Microsoft service issues, we are in contact with Microsoft and will provide further update...	Draft	5/6/2025 2:44 PM
Critical Issue	Critical Issue - Test 6	Draft	4/24/2025 6:01 PM
Update	Update - test 4	Draft	4/24/2025 6:01 PM
News	News - test 7	Draft	4/24/2025 6:41 PM
News	News - Test 1	Complete	4/16/2025 11:00 AM

Below the table, a detailed view of a news article is shown. The article title is 'Alex Test - Have you checked out our free training courses, check out the training courses section or ask our bot!'. The article is owned by Alex Wragg and was created on 5/7/2025 at 8:05 AM. The article is currently in 'Live' status. The article content is 'Testing Standard News Info'. The article is categorized as 'News' and has a 'News Type String' of 'News'.

Use Data from (Business Central)

Use Business Central APIs to surface live data into your Power Pages portal.

- Connect via custom connectors or HTTP calls
- Display purchase orders, item availability, or pricing
- Secure access using Dataverse or authenticated web roles
- This enables external users to interact with BC data—without giving direct access to the ERP system.

Access and Table Permissions

Power Pages uses **Web Roles** and **Table Permissions** to manage access.

- Restrict data by role (e.g., customer, supplier, internal)
- Define row-level and column-level access via Dataverse
- Supports anonymous, authenticated, and external identity providers

Table permissions:

+ New permission

Default Search

Name	Status	Table	Access Type	Roles	Relationship	Read	Update	Create	Delete	Append	Append to
Category Global Pe...	Active	Category	Global access	Authenticated Users	---	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service ...	Active	Account	Contact access	Authenticated Users	contact, history#C_accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Service ...	Active	Activity	Account access	Authenticated Users	Account, ActivityHistory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Web roles

Control who gets to access your site data and content. Create and manage web roles and grant access to specific people to view site tables and pages. [Learn more](#)

All roles

Search + Add new role

Manage contacts on your site. You'll be redirected to Portal Management app to manage contacts. [Learn more](#) Manage contacts

Role	Description	Pages with access	Table Permissions
Administrators	There is no description	View	View
Anonymous Users	There is no description	View	View
Authenticated Users	There is no description	View	View

Secure your portal with precision — without complex coding.



Demo Time – Getting Started

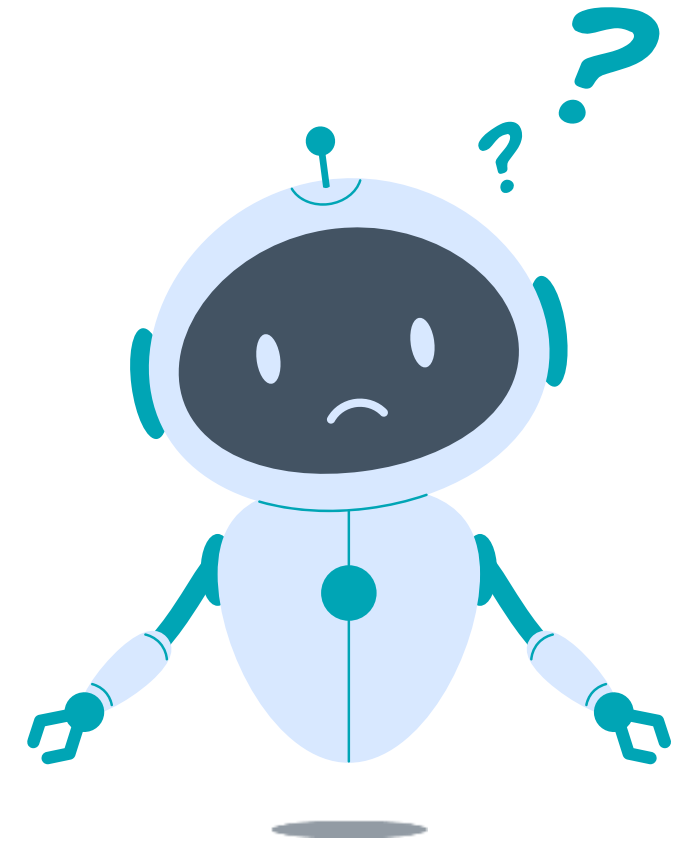


Starting Your Portal Project

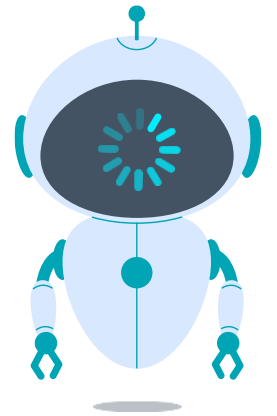
Review What is Power Pages?

Power Pages is:

- A low-code platform to build external-facing websites
- Connected to Dataverse for secure data storage
- Fully integrated with Power Platform (Automate, BI, Power Apps)
- Secured via Microsoft Entra ID, Azure AD B2C, or local login



How Could You Use Power Pages?



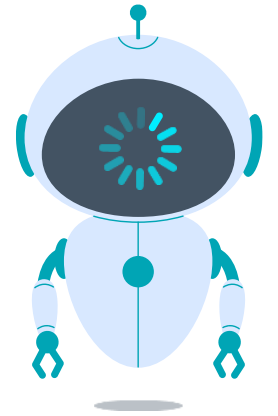
Could your customers, suppliers, or partners benefit from secure self-service?

- Start with one use case —case tracking or knowledge sharing
- Identify data you already store in CRM or BC
- Consider what users really need to see or do
- Start building with templates or a proof of concept

Power Pages helps you deliver real-time access, securely — without starting from scratch.

How to Start Your Portal Project

1. Define your audience – who is the portal for?
2. Identify what they need to do – view, submit, search?
3. Align with your data model – Dataverse tables/entities
4. Prototype quickly – get feedback early
5. Review licensing – pay per authenticated user or login capacity



Q&A

Thank you!



CRM

connect

THURSDAY 15th MAY 2025

