

Portal Training for Dynamics 365

Course Level: 300

Portal extends CRM for Dynamics 365 for various industries and organizations' client needs. Features include rich content publishing capabilities for various platforms – including mobile devices – in a secured environment. This course will teach installation best practices, configuration, and management of your portal and CRM integration for external and internal audiences.

DYNAMICS 365
UNIVERSITY 

Break Return Time:
1:20 PM



Use data from only one level away

Display information from parent entity, cannot display fr

Search one record type at a time

Will only export up to 10,000 records

© 2015 All

At A Glance: Portal Training for Dynamics 365

Why Enroll?

Learn portal functionality, configuration, and implementation steps.



Who to Enroll?

System Administrators -
Content Authors -
SMEs Interested in Portal -
Functionality



Key Takeaways

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



Register

Register for a Portal Training
today!

[Click to Register.](#)

About this Training



Intended Audience

This course is intended for technical architects, developers, and administrators with .NET experience and CRM for Dynamics 365 administrative experience. Not recommended for end users.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data or relational databases is helpful
- Basic concepts and understanding of Dynamics 365

Key Takeaways

This Training Will Teach You:

- Portals overview & configuration
- Fundamentals
- Security
- Branding and design
- Liquid guide
- Client-side development
- Extending portals
- Portal solutions & integration



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

INTRODUCTION

Introduction to Portals

- Getting Started with Dynamics Portal
- Multi-Languages

Security

Portal Security Content Management

Forms

Entity Forms

*Agenda is tentative and subject to changes based upon learner comprehension, instructor's discretion, and other factors.
Order, pace, content, and timeline subject to change.*

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DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

ENTITIES

- Entity Lists
- Web Forms
- Entity Permissions

KNOWLEDGE MANAGEMENT

- Knowledge Management
- Integration with Other Services
- Liquid Templating
- Portal Bootstrap Theming

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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