

Guide to choosing a Web Portal Solution for Dynamics CRM, 365 and CDS



Investigating any technology solution for your business can be overwhelming.

How do you know if you are asking the right questions and getting the best solution available?

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When it comes to choosing a Web Portal Solution, there are many factors that will help determine the solution that is right for your particular needs.

We outline the various factors and present the information that relates to the two main solutions available – The Portal Connector and Microsoft Power Apps Portals.

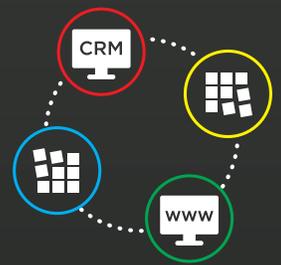
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KEY TERMS

Microsoft has changed the names of the Dynamics CRM product line over the years, so there are many terms that relate to the Dynamics CRM technology and its evolution. Here is a guide to the key Microsoft terms you will see:

- **Dynamics CRM**, Customer Relationship Platform, earliest version of Dynamics
- **Dynamics 365**, Evolution of Dynamics, embracing the Cloud, and Office 365
- **Dynamics CE**, Customer Engagement, subset of Dynamics 365
- **Dynamics CDS**, The Common Data Service, the database that Dynamics and Power Platform Applications are built on
- **Power Apps Portals**, Portal App in Dynamics 365 (formerly Microsoft Portals / ADX Studio Portals)

PLATFORM

Before you delve into the capabilities of portal solutions, there are some important platform questions that need to be answered. We will address those first.

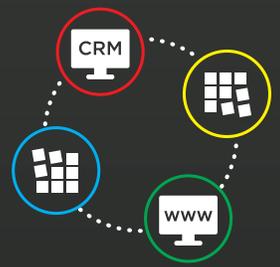
Version of Dynamics

Your web portal journey starts with the version of Dynamics you are currently using. If you have Dynamics 365 Online, then Power Apps Portals is available to you, as well as The Portal Connector. If you are On-Premise with Dynamics CRM or Dynamics 365, then Power Apps Portals is not available. In these scenarios, The Portal Connector is a viable option.

Version of Dynamics	Power Apps Portals	The Portal Connector
Dynamics 365 Online, CDS	Yes	Yes
Dynamics CRM, 365 On-Premise	No	Yes

“ Altec needed a portal solution with deep integration into CRM data and it had to be easy to maintain. We chose The Portal Connector, which is easy to use, without the need for custom coding. Other Microsoft portal solutions were going to cost \$100,000 in custom development. With The Portal Connector, we have a web portal that we can manage ourselves well into the future. ”

- April Blankenship, Altec



Hosting Options

Where do you host your current website, and where would you like to host your portal? There are many avenues to look at when reviewing hosting. Microsoft Azure, on-premise servers or third-party hosting providers, like you probably use for your current website.

If you want to host in Azure, then Power Apps Portals is an option, as well as The Portal Connector. If you prefer alternate hosting options, then Power Apps Portals is no longer a consideration, while The Portal Connector can be hosted anywhere.

Hosting Options	Power Apps Portals	The Portal Connector
Hosted in Azure	Yes	Yes
Third-Party Hosting Provider	No	Yes
On-Premise Hosting	No	Yes

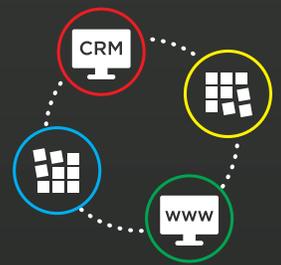
Licensing Options

Here is where your options get really interesting, and complicated.

Power Apps Portals is **delivered on a consumption basis**, so you pay per user login and page views when your portal is accessed by your end customers. In addition, you need to pre-purchase the consumption amounts each month to keep your portal running. If you don't use the credit you purchased, it does not roll over into the next month. You will need to purchase enough credit to keep your portal running month over month as Microsoft will have a limited grace period for credit shortages.

With The Portal Connector, you **purchase the license up front**, with no monthly consumption related costs. The Portal Connector also has a Yearly Maintenance Fee of 30%, the maintenance fee is optional but comes with some great benefits for staying current. If you don't renew your maintenance your portal will continue to function as it always has. With The Portal Connector being a "perpetual" license and not consumption based, you can encourage your customers to use your web portal as much as they like, you don't pay a cent more.





Here is a summary of the pricing model:

Licensing	Power Apps Portals	The Portal Connector
Per Login	100 = \$200/month 1,000 = \$1,000/month 5,000 = \$3,500/month	
Per Page View	100,000 = \$100/month	
Upfront License (perpetual)		\$15,000
Yearly Maintenance (optional)		\$4,500

You may find it confusing to conceptualize the costs presented here, so we prepared a 3-year scenario to show how the licensing models compare.

Scenario Background Data:

- An organization has 1,000 active users, members or customers
- 600, or 60%, log into the portal each month for updates and various other functions
- Of the 600, 50% log in 3+ times per month, totaling **1,200 unique logins per month**
- The portal is a public-facing website with less than **100,000 page views per month**
- Note: This scenario is based on static data and does not account for membership or organization growth

Licensing Scenario	Power Apps Portals	The Portal Connector
Year 1	1,200 logins/month = \$1,400 100,00 page views/month = \$100 Monthly Cost = \$1,500 Annual Year 1 Cost = \$18,000	\$15,000
Year 2	\$18,000	\$4,500
Year 3	\$18,000	\$4,500
Total	\$54,000 *	\$24,000 **

* This estimate is based on the minimum consumption for this scenario. If your consumption rates increase, your upfront monthly costs, and yearly costs would follow suit. The behaviour of your customers will determine the amount you pay each month.

** The Portal Connector costs do not include hosting as this would be determined by your hosting preferences.



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TECHNOLOGY

Are we still together on this journey?

If so, the next step is to evaluate the technology and the user's experience.



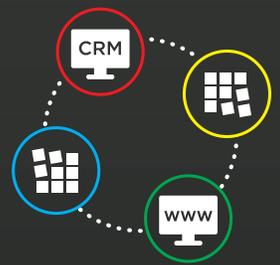
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No Code Low Code

This is a term coined by Microsoft. Another term is Drag and Drop Tools, they both serve the same purpose. Which is, **can the average Dynamics User create their own portal?**

Power Apps Portals introduced a designer so CRM users can drag entities onto a template and create a basic portal interface. When published this allows customers to view and interact with the data in those particular entities.

To make this easier, there are Dynamics CE portal templates for Customer Self Service, Partner Management, Community Self Service and Employee Self Service. If you find these templates will meet your needs, then the No Code Low Code functionality in Power Apps Portals may work for you.

If you need a focus on user experience with different layouts, more branding options, variety in data display, or other web assets on your portal experience, then you will likely need custom coding to use Power Apps Portals. And you may need to be familiar with the programming language Liquid. There are also limitations in what can be performed, as Dynamics CE is not a website platform.

The important factor with Power Apps Portals is that all of the configuration of your portal experience is stored as records inside of your Dynamics 365 business system so. If you want to customize, you first need to understand the structure of the portal entities within Dynamics 365 and then add records to Dynamics 365 without using a visual drag and drop editor. This can be very tedious and confusing with a significant learning curve.

The Portal Connector provides a true Drag and Drop experience for Dynamics Users, including all of the functionality available in an Enterprise Website Content Management System.

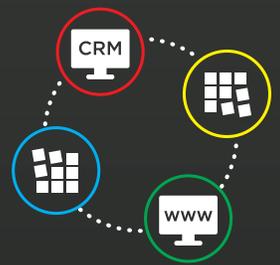
You have full control over branding, page display, and forms layout by dragging widgets and content types onto a page. It's a fully visual experience and you build your page as it will look to your customers.

All Dynamics CE and CDS data can be included, with flexibility in content and graphic presentations.

With The Portal Connector you can build a portal experience to meet the needs of your end customers, with no limitations.

“ We were considering a competitive portal product but The Portal Connector solution reduced the complexity and cost of the project. We've been really impressed with The Portal Connector and the supporting team. ”

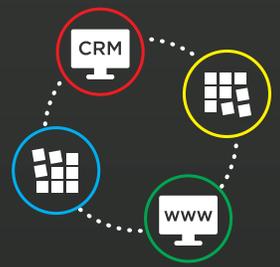
- Jon Kozell, The TM Group Inc.



This chart reflects the tasks that a CRM user can perform using the drag and drop editor.

No Code Low Code	Power Apps Portals	The Portal Connector
Drag Entities onto a Template	Yes	Yes
Use Portal Templates	Yes	Yes
Implement Corporate Branding	Limited	Yes
Include Custom CRM / CDS Entities	Yes	Yes
Adjust the Forms Layout, (columns and rows)	Limited	Yes
Change how the Data is Displayed	No	Yes
Include Website Assets like full site navigation, images, videos, blogs	Limited	Yes





Developer Tools

While drag and drop tools are helpful for Dynamics Users, Developers like to get their hands dirty and use tools to create advanced portal solutions.

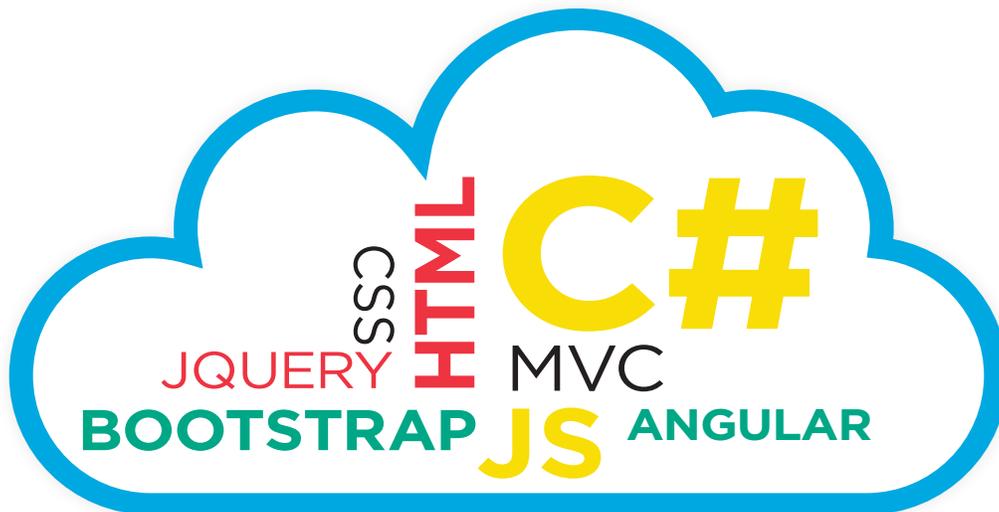
Power Apps Portals has some options for developer coding using Liquid to query data. In addition, there are some creative, and complicated, ways to use HTML, CSS and JavaScript. In order to do this, developers need to upload files to the Dynamics environment and in the end this process does not provide much value in the way of additional robust portal features.

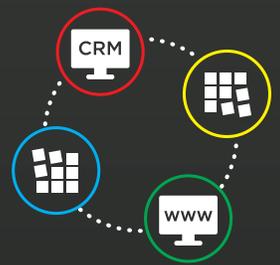
If you require any significant integration with other systems or you have complex user experience needs, your developers will not be able to use server-side development technologies like C# to create those integrations or experiences. Power Apps Portals is a closed system provided in a SaaS model which does not allow you to customize the hosted website files.

Because The Portal Connector is an Enterprise Content Management System, it includes a whole host of Developer Tools to ensure advanced and complex processes can be handled by developers.

For example, developers can use any front-end framework like HTML, CSS, jQuery, foundation or Bootstrap to build out the portal experience. C# code can be used for server-side integrations. A full suite of Kendo UI widgets are available to enhance your user experience. Visual Studio can be used, along with extensions to jump start the creation of customizations. The Portal Connector is the preferred product for Developers!

Developer Tools	Power Apps Portals	The Portal Connector
Front-end Customization	Yes	Yes
Server-side Customization	No	Yes
Visual Studio	No	Yes
Reusable Custom Widgets	No	Yes





Portal, Web Portal and Website

Dynamics CRM/365/CDS is not a website platform, or website content management system. There are limitations to the functionality available with Power Apps Portals. While a web-based experience can be provided to your customers, the tools and processes provided by a true website are not available. Limitations include:

- Limited design capabilities to match your website branding experience
- Limited flexibility in layout and design of forms or grids

The Portal Connector, on the other hand, is built on a Website Content Management System. It was created to provide a rich website experience for your web portal solution – not just a web-based experience. You have all of the tools and capabilities of an Enterprise Website Solution, with the ability to deliver custom portal experiences on any web page.

Website Capabilities	Power Apps Portals	The Portal Connector
Web-based Portal	Yes	Yes
Website Capabilities	Limited	Yes

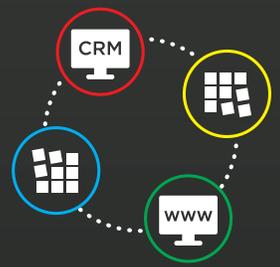
Permissions and Security

Any time you surface sensitive data on a web-based portal, you need to be concerned about **the security of the information and who has permissions to view each piece of data**. When you consider the kinds of data you might want your customers to see, this could get complicated.

With Power Apps Portals the procedures to assign permissions is a bit obscure and convoluted. Creating web roles, relationships with data and applying the web role security to pages is not easy or visually represented.

On the other hand, permissions for data access with The Portal Connector is explicit. The process is very visual, provides granular permission settings for widgets, pages and content items. It is very easy to visually determine who has access to what information.

Permissions	Power Apps Portals	The Portal Connector
Process to Assign Permissions is easy for CRM Users	No	Yes
Visual Display of Roles and Associated Permissions	No	Yes
Granular Permission Settings for Widgets, Pages and Content Items	No	Yes
Multiple Authentication Methods	Yes	Yes



SUMMARY

In summary, The Portal Connector is the preferred product when:

- You value **cost certainty** over monthly consumption-based subscription costs
- You want **Drag and Drop Tools** that allow users to visually build out a web portal page
- The developers you have want to use the language of their choice to **build out complex portal solutions**
- **Hosting options** are important to you or you have data residency concerns

What's Next?

Learn more about The Portal Connector:



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www.portalconnector.com/webinar



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