

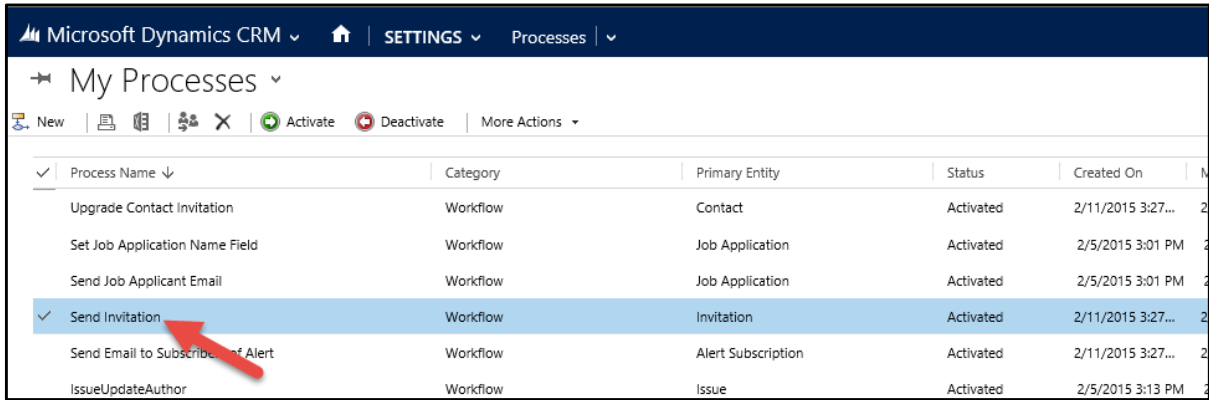


Send Portal Invitations

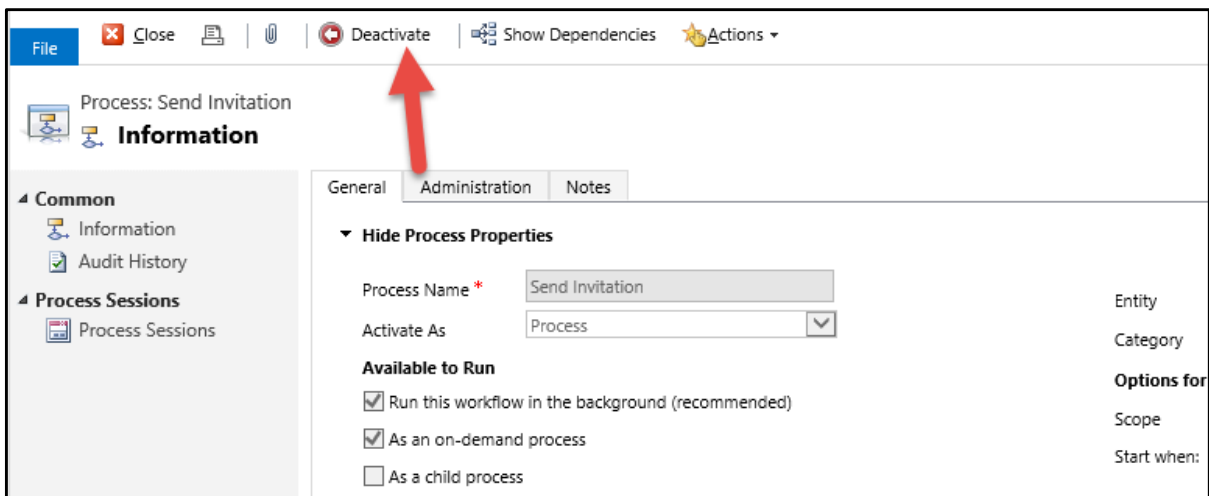
After completing this guide you will be able to send invitations to new users allowing them to use your web portal.

How to Send Portal Invitations

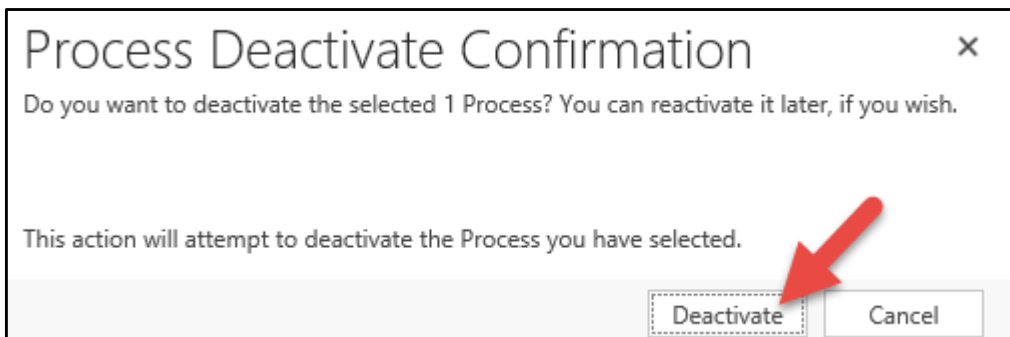
- 1) You will first customize the invitation email. From your Dynamics CRM instance navigate to Settings | Processes and open the Send Invitation workflow.



- 2) Deactivate the Workflow.

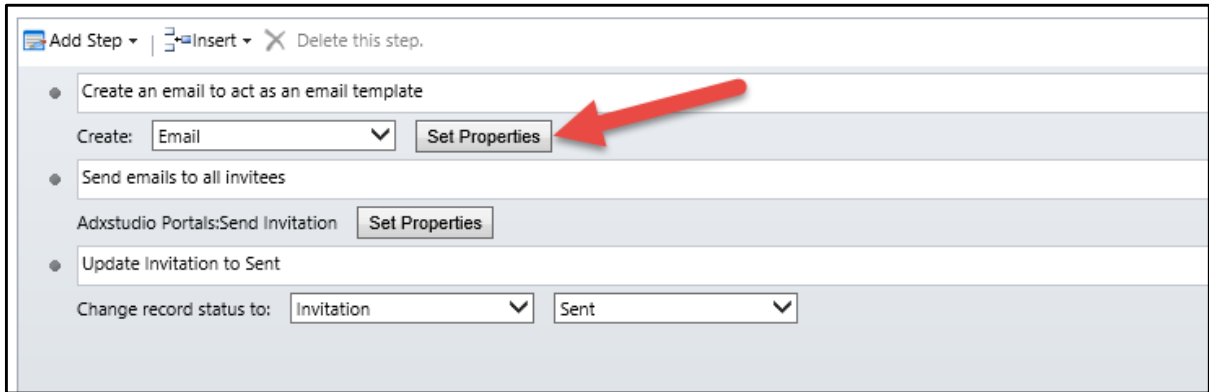


- 3) Click Deactivate again.



Send Portal Invitations

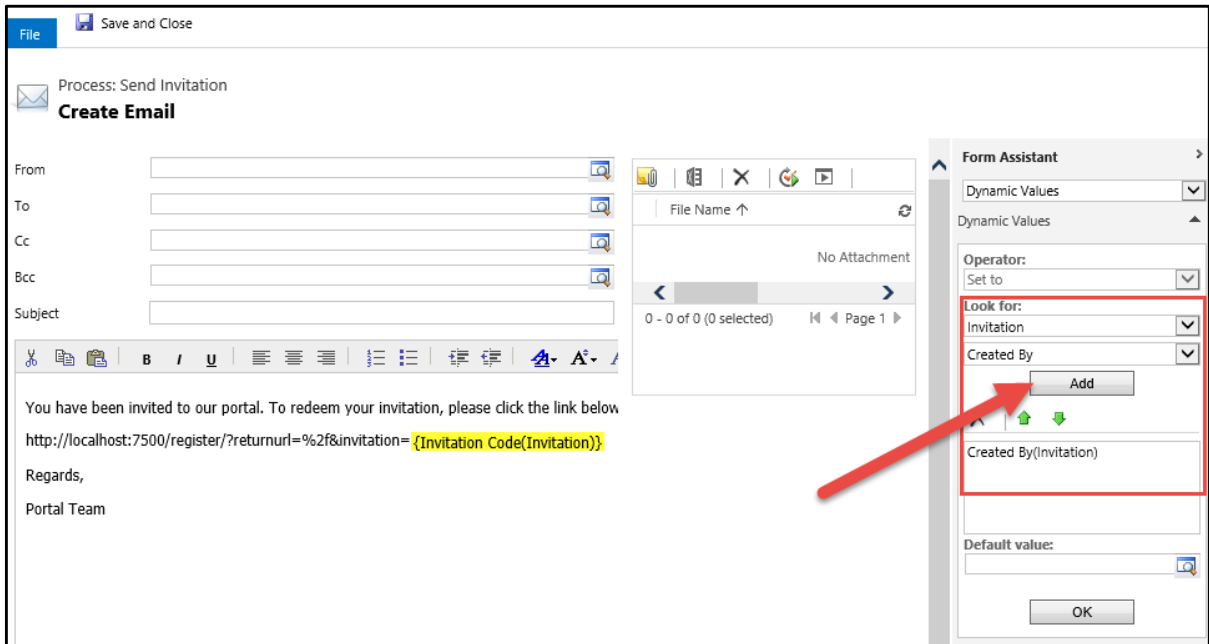
- Click on the Set Properties button of the email creation step.



The screenshot shows a configuration interface for an email step. At the top, there are buttons for 'Add Step', 'Insert', and 'Delete this step'. Below this, there are three main steps:

- Create an email to act as an email template:** This step is highlighted. It includes a 'Create:' dropdown menu set to 'Email' and a 'Set Properties' button. A red arrow points to this 'Set Properties' button.
- Send emails to all invitees:** This step includes a 'Set Properties' button.
- Update Invitation to Sent:** This step includes two dropdown menus for 'Change record status to:', with 'Invitation' and 'Sent' selected.

- Click on the From field, select Invitation from the Look for dropdown, select Created By, and click Add.



The screenshot shows the 'Create Email' form in a software application. The form has fields for 'From', 'To', 'Cc', 'Bcc', and 'Subject'. Below these fields is a rich text editor containing the following text:

You have been invited to our portal. To redeem your invitation, please click the link below
[http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code\(Invitation\)}](http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code(Invitation)})
Regards,
Portal Team

The 'Form Assistant' panel is open on the right side of the screen. It shows the 'Dynamic Values' section with the following configuration:

- Operator:** Set to
- Look for:** Invitation
- Created By:** Created By
- Buttons:** An 'Add' button is highlighted with a red box and a red arrow.
- Default value:** Created By(Invitation)
- OK** button at the bottom.

Send Portal Invitations

6) Click OK.

Process: Send Invitation
Create Email

From: {Created By(Invitation)}

To:

Cc:

Bcc:

Subject:

You have been invited to our portal. To redeem your invitation, please click the link below
[http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code\(Invitation\)}](http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code(Invitation)})

Regards,
Portal Team

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Invitation

Created By

Add

Created By(Invitation)

Default value:

OK

7) Set the To field as shown below:

Process: Send Invitation
Create Email

From: {Created By(Invitation)}

To: {Invite Contact(invitation)}

Cc:

Bcc:

Subject:

You have been invited to our portal. To redeem your invitation, please click the link below
[http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code\(Invitation\)}](http://localhost:7500/register?returnurl=%2f&invitation={Invitation Code(Invitation)})

Regards,
Portal Team

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Invitation

Invite Contact

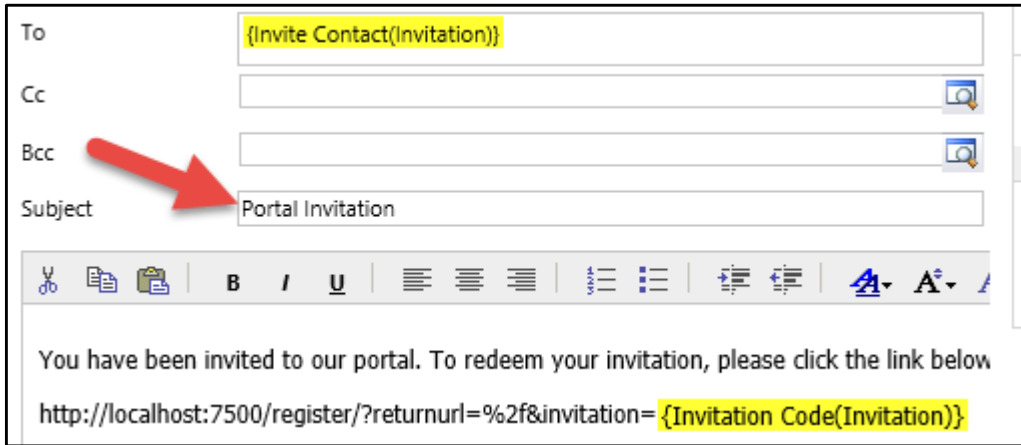
Add

Invite Contact(Invitation)

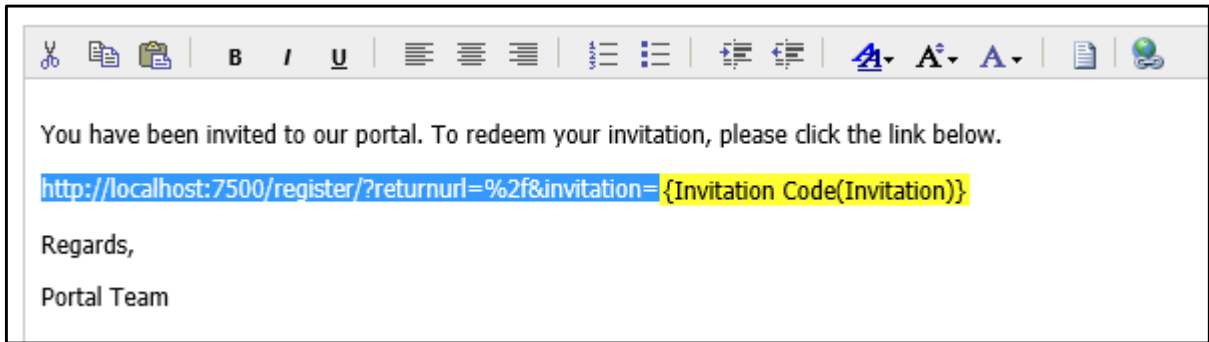
Default value:

OK

8) Enter "Portal Invitation" for Subject.



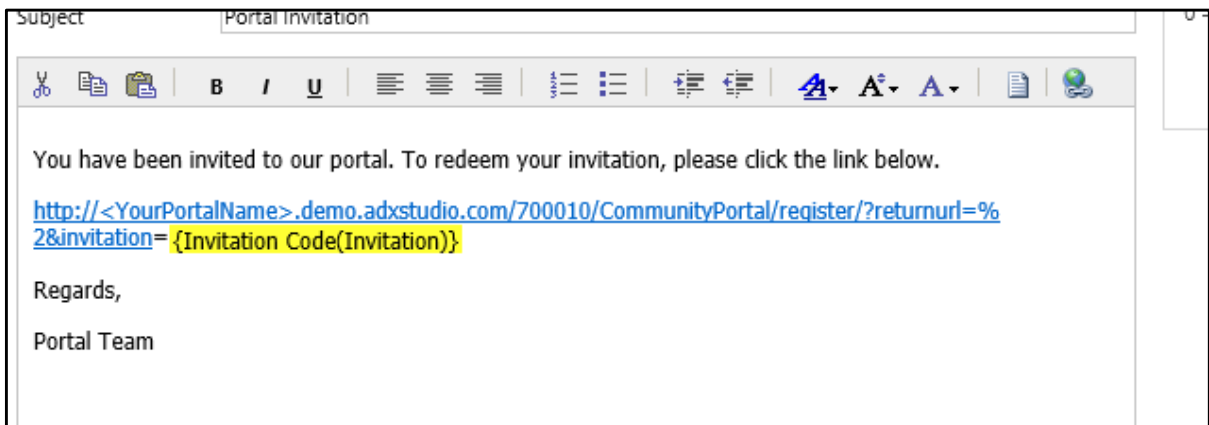
9) In the email body, select the URL before the highlighted text and delete it.



10) Add the below URL in front of the highlighted text. Replace <YourPortalName> with name designated for your portal.

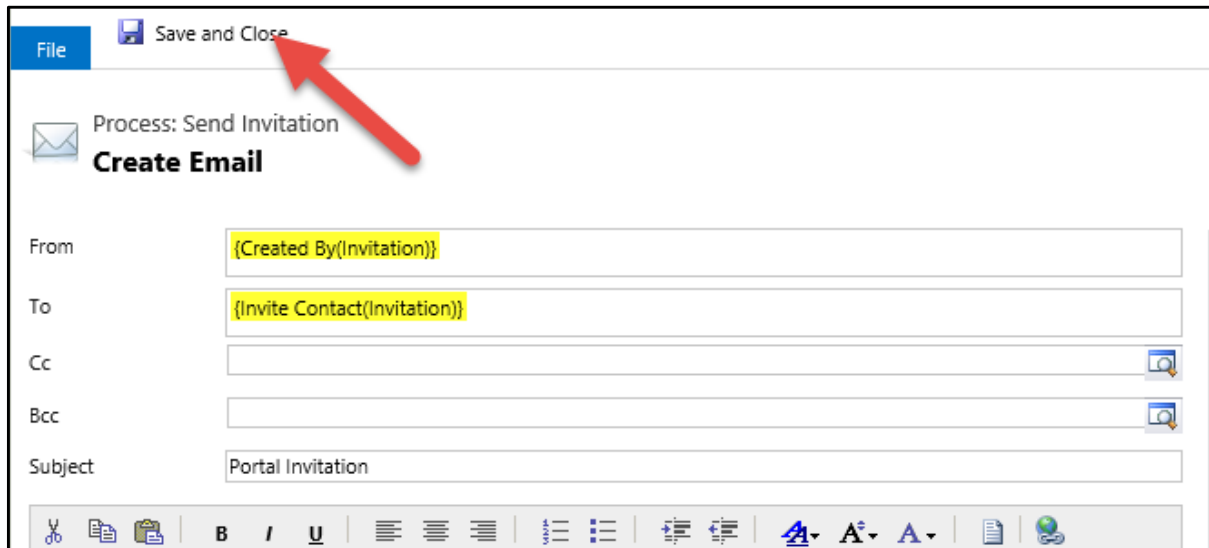
<http://<YourPortalName>.demo.adxstudio.com/700010/CommunityPortal/register/?returnurl=%2&invitation=>

11) The URL will now look like the image below:



Send Portal Invitations

12) Click Save and Close.



File | Save and Close

Process: Send Invitation
Create Email

From: {Created By(Invitation)}

To: {Invite Contact(Invitation)}

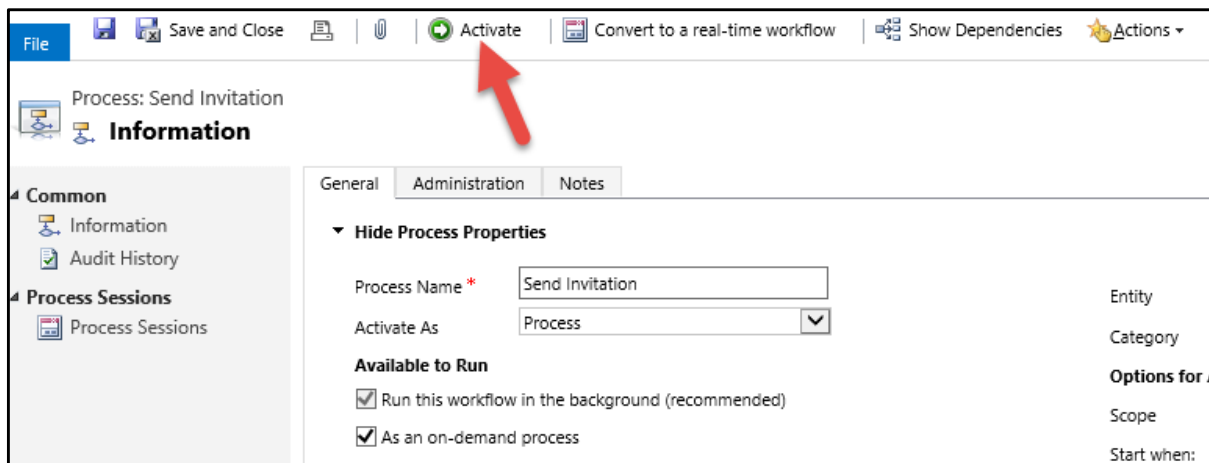
Cc: [Search]

Bcc: [Search]

Subject: Portal Invitation

[Rich Text Editor Toolbar]

13) Activate the workflow.



File | Save and Close | Activate | Convert to a real-time workflow | Show Dependencies | Actions

Process: Send Invitation
Information

Common

- Information
- Audit History

Process Sessions

- Process Sessions

General | Administration | Notes

Hide Process Properties

Process Name * | Send Invitation | Entity

Activate As | Process | Category

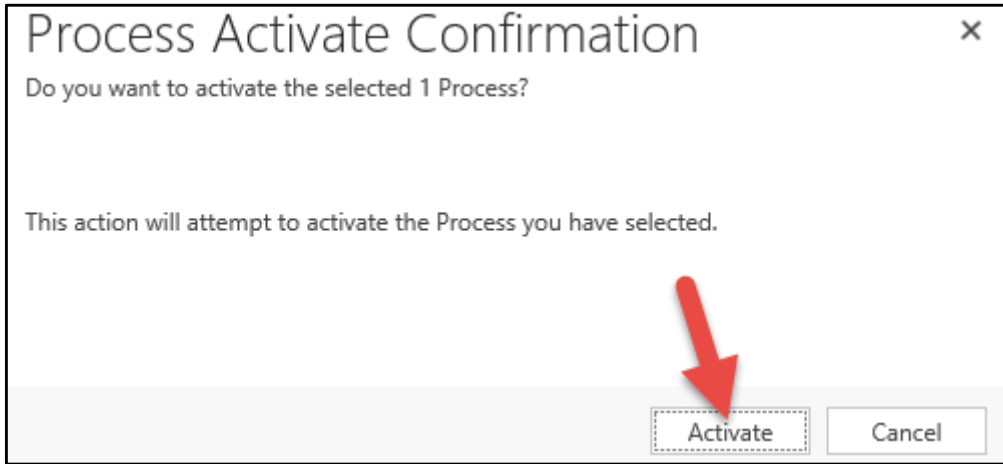
Available to Run

- Run this workflow in the background (recommended)
- As an on-demand process

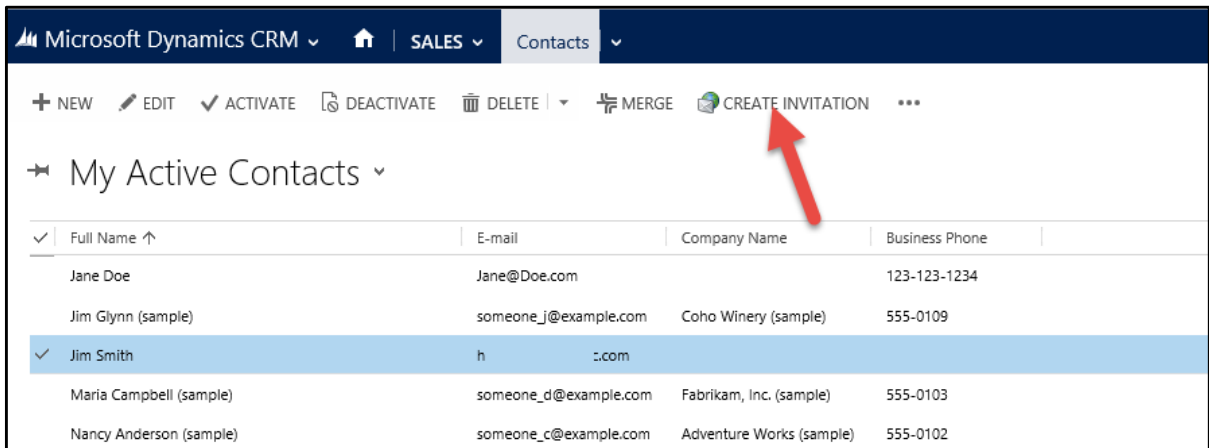
Options for

- Scope
- Start when:

14) Click Activate to confirm.

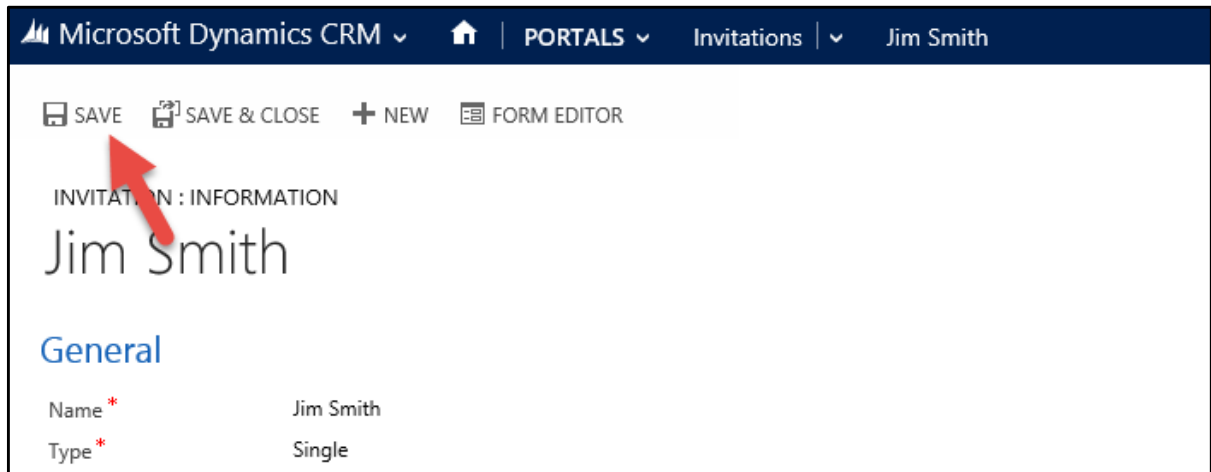


15) You are now ready to send Invitations. Navigate to Sales | Contacts and select a Contact with a good email address. Click Create Invitation.

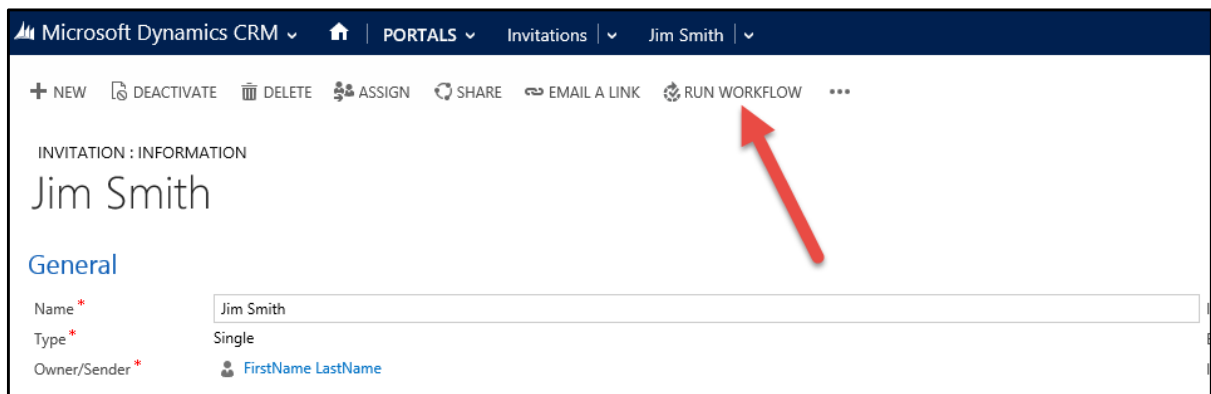


Send Portal Invitations

16) Click Save.



17) Click Run Workflow.



18) Select Send Invitation Workflow and click Add.

Look Up Record

Enter your search criteria.

Look for Show Only My Records

Look in

Search

	Process Name	Category	Created On	Mod	
✓	Send Invitation	Workflow	2/11/2015 3:27...	2/12/2015	

19) Click OK to confirm.

Confirm Application of Workflow

This workflow will be applied to 1 Invitation.

You can monitor workflow jobs by opening each Invitation and clicking Workflows.

Are you sure that you want to continue?

This concludes the *Send Portal Invitations* guide.

Please proceed to the *Redeem Portal Invitations* guide.