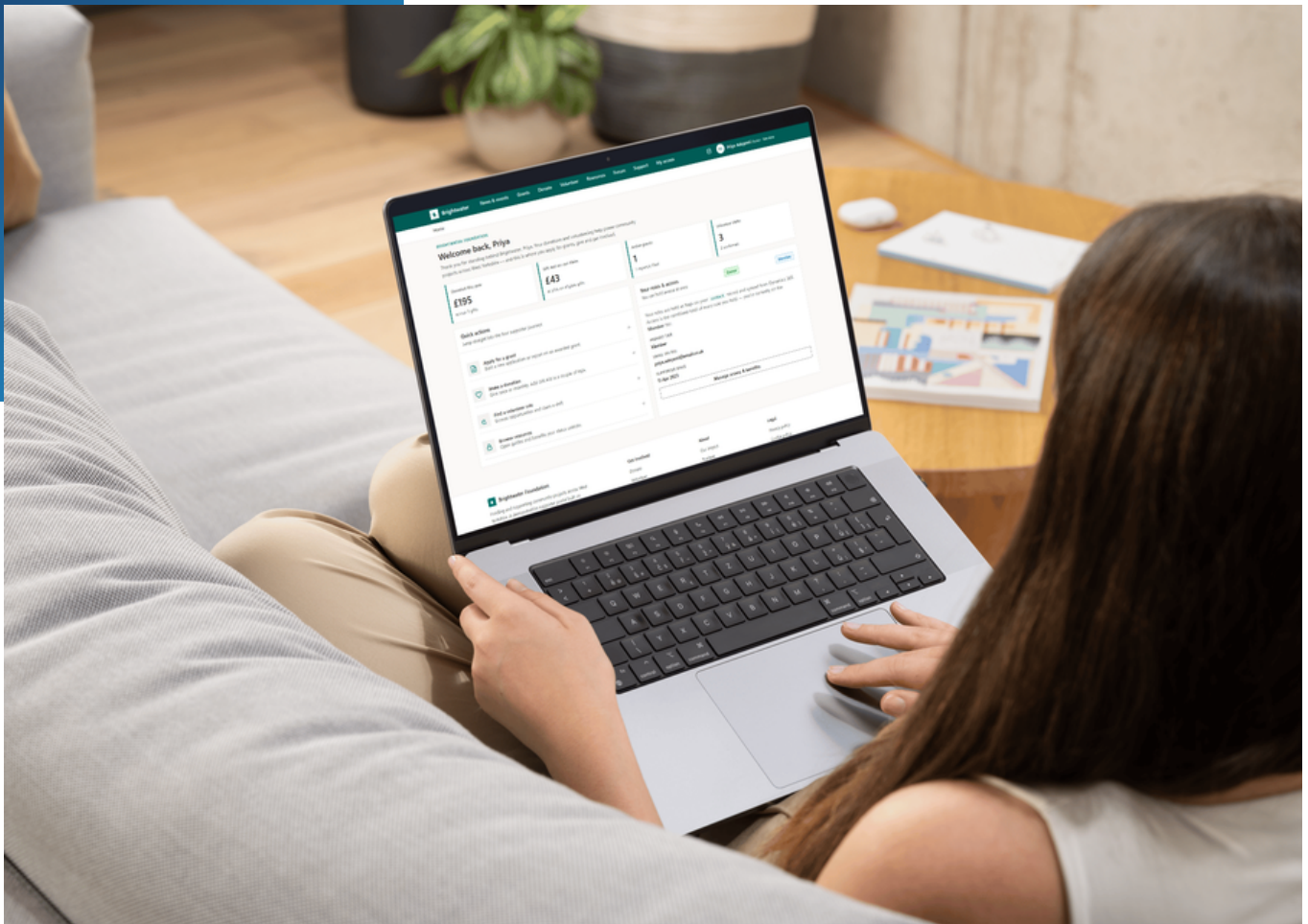




THE INTELLIGENT WEB PORTAL ADVANTAGE

What a modern web portal
can do for your customers,
members and partners.



Portals That Do More

A web portal used to be a login screen and a few forms. Today, connected to live data from CRM and other systems and with AI built in, they let people self-serve: finding answers, tracking progress, and completing processes such as applications, registrations, and bookings.

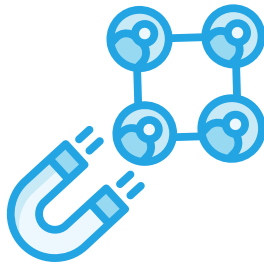
At ServerSys, through our brand The Portal Company, building portals on Dynamics 365 and the Microsoft Power Platform is central to our business. We have delivered them for charities, regulators, membership organisations, healthcare providers

and professional services firms, each serving their customers, members, partners and other external users online.

The result is fewer repetitive tasks for staff, faster answers for the people you serve, and records that stay current because users have direct access.

This guide covers what a modern portal makes possible, the realistic outcomes, and how we help you get there.

What You Gain From a Modern Portal



You grow without increasing headcount

When applications, renewals and support requests run as self-service workflows, volume becomes less of a resource problem. The work that used to cap the number of tasks teams could handle now scales automatically.

One hub for everything

Account details, case history, documents, and requests are securely accessible to external users on demand within a single online hub.



You serve people on their terms

Most people reach for online tools before they pick up the phone, and a sizeable group would rather not call at all. A portal meets that preference.

Understand your users

Recognise which features are used most, which steps cause people to drop off, and what they search for but never find. A portal shows you how people behave, not how you assumed they would.



Your Portal, Built Into Your Data

Our portals are built into the Microsoft stack, so they work as an extension of your organisation.

Connected to Dynamics 365 and the Power Platform

We configure portals that provide built-in integration across Dynamics 365, Power Apps, Power Automate and Power BI. For example, a service request or a form submitted via your portal will instantly appear in Dynamics, ready to run the next step, so teams always work with up-to-date information.

Data also flows the other way. When an authenticated user updates a record through the portal, the change is written straight back into Dynamics 365 or Power Apps.

WEB PORTAL AND DYNAMICS 365 INTEGRATION

Native integration with Dynamics 365 and other Microsoft products.



Personalised pages that surface data from any Dynamics 365 table.



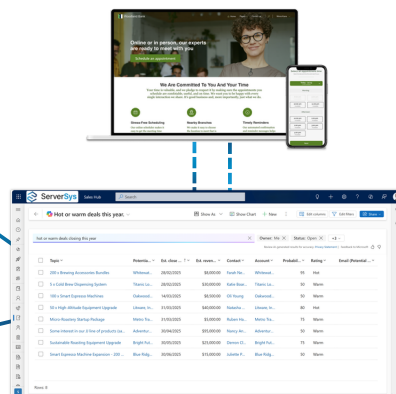
Dynamics 365 security controls define what each user can view, edit and create.



Dynamics 365 views and forms are shared with portal users inside your branded site.



Automated flows between your CRM and your website.



Connecting the Systems Your Processes Depend On

Because processes don't always live in a single system, we connect portals to the external services your workflows rely on, ensuring users have a consistent experience and teams don't need to move data by hand.

Examples we integrate include:

- **Accounting and ERP systems** such as Sage and Business Central, for automated invoicing, payment tracking and financial reporting through the portal.
- **Company and address data**, including Companies House and Loqate, that keep business and contact records accurate and speed up registrations.
- **Credit and risk management services**, featuring Creditsafe, for automated checks on B2B applications and partnerships.

Connect these, and the complexity stays behind the scenes where it belongs.

Web Portal Outcomes



Increased Engagement

External users to access resources, manage their accounts and request services.



Stronger Relationships

A trusted, responsive service that people return to and rely on.



Simpler Operations

Automated workflows handle routine processes and scale without extra effort.



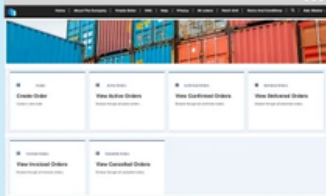
Sharper Insights

A live view of portal activity to better understand customers and stakeholders.

Frequent Portal Examples

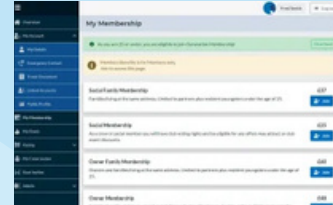
Data-driven portals fit almost any organisation and audience. These are the types we are asked to build most often:

Customer Portals



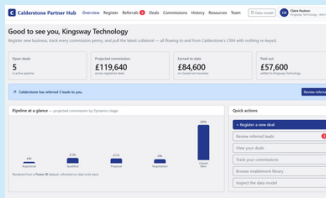
Connected self-service that gives customers control.

Member Portals



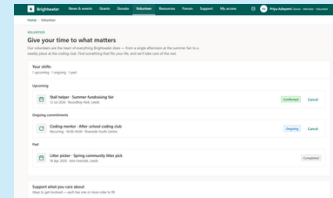
Personalised experiences that lift engagement and retention.

Partner Portals



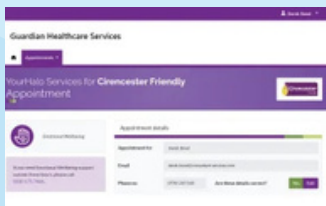
Online collaboration to grow your partner channel.

Community Portals



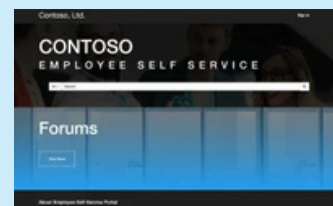
Hubs that build networks and conversation.

Supplier Portals



Integrated processes to make supply chains run smoother.

Employee Portals



One place for the services and resources your people need.

Research Portals



A secure, single entry point for sharing analysis with subscribers

Accreditation Portals



Managed journeys that keep compliance on track

Let Automation Handle the Routine

Automation is where a portal can make the biggest difference to your team's workload. It removes the manual, repeatable steps that sit between data entry and an outcome.

A form submitted on the portal triggers those actions automatically, validating data, running checks in line with your rules or routing requests for approval.

This means that applications, registrations and other processes move faster and reduce the risk of errors associated with back-office data entry.

The same applies to onboarding new users, managing subscriptions, taking payments and updating records in Dynamics 365.

Once the rules are set, your portal can run them without teams needing to micro-manage.



From Answering Questions to Getting Things Done

Automation handles the process, but AI changes what a portal can do for a user. The interesting part is no longer a chatbot reading from a help article. It is a portal that understands who someone is and knows the context of a process, helping them finish what they came to do.

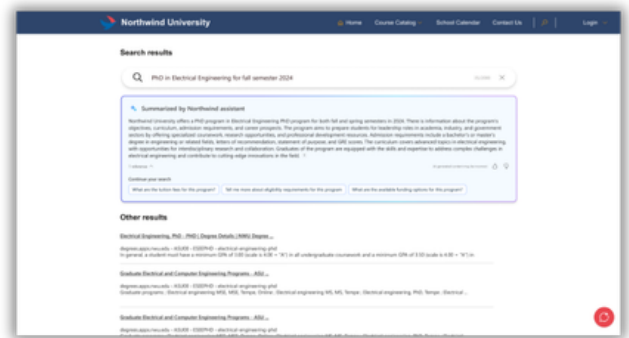
When someone signs in through a verified identity, an AI agent recognises them and works within their permissions. Its answers reflect what you already know about that person, not just what sits in a document. Ask where a support case stands. The agent can summarise it from the live record and hand it off to your service team if it cannot resolve the query.

Conversations instead of web forms

Long forms create friction, especially for applications and registrations. An agent can guide someone through the same questions in a two-way conversation, explain what a field needs, and ask for more when an answer is incomplete. It writes to the same Dataverse table as a conventional web form, so both routes create the same record and start the same process. People have the flexibility to choose the experience that suits them.

Reading documents, not retyping

When a form accepts an upload, an agent can read a PDF or an image and map its details to the appropriate fields in your CRM. If anyone currently copies information off these documents by hand, that manual work can disappear.



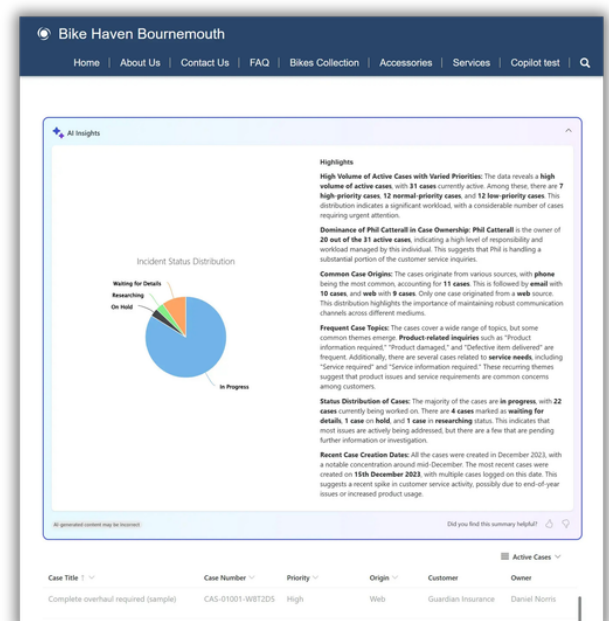
AI Search Summaries

Summaries that save reading

Portal page summaries make it easier for people to interpret information. Alongside policy text, terms or a table of transactions, AI-generated summaries can highlight the key points and present data visually.

Good data matters more

These capabilities raise the value of a portal and the importance of what sits behind it. The moment an agent presents your data to a customer, its quality becomes immediately visible. Within an organisation, poor data is an internal problem, but on a portal, it's on show.



AI List Summaries

Security is the top concern for any portal that opens data to external users. The foundation is well established: our portals run on the same Microsoft cloud platform that secures enterprise and government workloads.

Built on Azure, they inherit enterprise-grade infrastructure protections: data encrypted in transit and at rest, automatic patching, denial of service attack protection, and a Zero Trust model where every request is verified and default access is kept to a minimum. Microsoft handles this security layer for you.

What decides your real-world security is the configuration above it. Almost every portal security issue traces back to how access and permissions were set up, not to any weakness in the product. Who can register and how, what each role can see, which records and fields are visible, and how anonymous access is handled. These are critical decisions that we cover in our portal scoping consultancy.

This is where a specialist partner changes the outcome. We work through each choice with clients, in the context of their data and security policies, so the right boundaries are in place before launch rather than retrofitted after a gap appears.

Security roles let you precisely control what each user can see and do, so a customer might view only their own orders, while a partner can access shared collaboration documents. By getting this right at the start, you avoid the risk of difficult remediation work that follows.

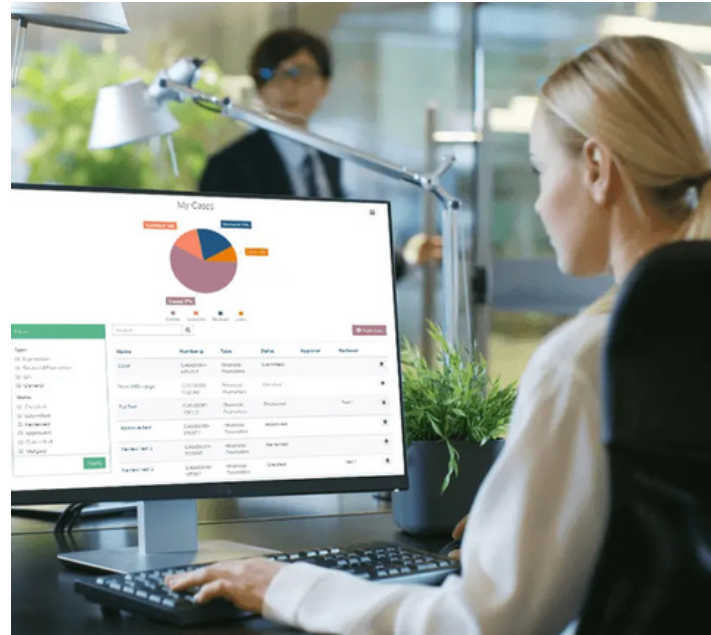


What Your Portal Tells You

Each portal generates a stream of data about its users. Read it well, and you can learn which journeys work, where people get stuck, and what to improve.

AI-assisted reporting turns that activity into a clear view of usage and performance, so decisions about design, content and features rest on evidence rather than guesswork.

It also shows whether your automation and AI features are doing their job by measuring their impact on efficiency and satisfaction. That feedback is what keeps a portal delivering and improving.



OUR PORTAL TECHNOLOGY

We build on whichever Microsoft foundation fits your needs:



Power Pages

Launch data-powered portals quickly with templates for common scenarios.

- ✓ Faster deployment
- ✓ Lower upfront cost
- ✓ Simpler development



Custom Azure Portal

Full design freedom to tailor every part of your site.

- ✓ Reduced running cost
- ✓ Increase scalability
- ✓ Fully bespoke design

5 Processes Perfect for Portals

Portals are at their best with routine, repeatable processes. The five we configure most often are:

Applications and Registrations



Including membership applications, grant funding requests and event sign-ups. The portal collects the information and documents, then sends them into your backend systems.

Payment Processing



Secure online payments for services, products or fees, through PCI-compliant gateways such as Stripe, for membership purchases, event bookings and other transactions.

Service Requests and Support



Users log requests, raise enquiries and report issues. Each one creates and assigns a related case in Dynamics 365 Customer Service, tracked against your routing rules and service level agreements.

Account Management



People update their own details, review history, manage subscriptions and find their documents, without contacting your team for routine tasks.

Information Access

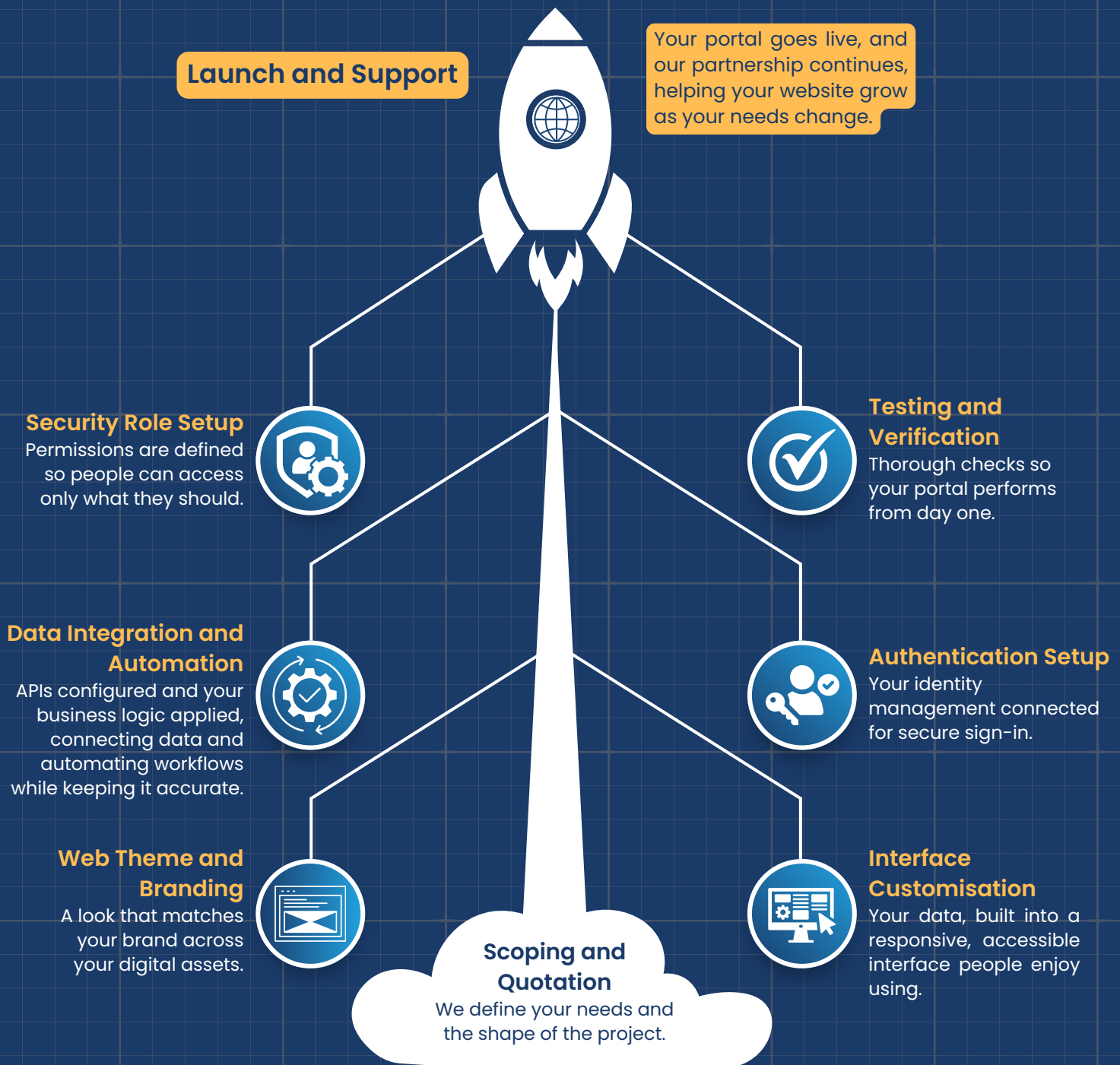


A central hub for documents, FAQs and guides, including gated content for paid subscribers, so people can quickly find what they need.

How We Deliver Your Portal

How a portal is designed and delivered determines adoption and success. We run these projects end-to-end, from the first scoping conversation to launch and beyond, using an agile approach that puts a working website in front of you early and keeps upfront costs down.

OUR PORTAL PROJECT APPROACH



Where the Return Comes From

The value of a portal builds from these five factors working together.

Intuitive Design and Journeys

Clear journeys and forms that avoid friction. Adoption is where the return starts.

One Source of Truth

Data is connected to Dynamics 365, so nothing falls between systems.

Convenience and Choice

Self-service, intelligent features and personalised information give people flexibility and control.

A Launch That People Notice

Promote what your portal offers and plan a proper launch, or the best site risks reaching few people.

Continuous Improvements

Make changes and add features when your needs move, and the return keeps coming.

Portals We Are Proud Of

A few of the organisations we have helped, and what changed for them.



Cycling UK

A leading cycling charity was held back by its ageing membership system. Their new Dynamics 365-connected portal lifted engagement and event participation through personalised content and self-service capabilities.



Police Now

This officer-development charity needed a secure way to manage recruitment. Their portal handles applications, protects sensitive data and gives candidates resources for community networking.



Healthcare RM

A leading employee health management provider. Their custom portal let them widen their services and reach, and now serves as the blueprint for the portals they roll out to their own customers.



Office of the Data Protection Authority

Guernsey's data protection regulator. Our portal handles their registration management and gives a secure channel for enquiries and guidance, improving efficiency and supporting compliance.



Tellimer

A global emerging-markets platform delivering intelligence and research. Their portal provides premium content, personalised dashboards and interactive visualisations that lift engagement.



Junior Offshore Group

A yacht club running competitive races. Their member portal handles the demands of racing, including payments, crew checklists and in-race timings, and brought new life to member engagement.



Let's Build Your Portal

Portals are not a sideline for us. We have a dedicated practice for building them using Power Pages and Azure technology, integrated with Dynamics 365 and other data sources on which processes run.

This specialist work turns a website into critical infrastructure your organisation can rely on.

If you are weighing up a new portal or rethinking one that has not delivered, we would like to hear what you are trying to achieve.

Ready to get started?

Talk to us about the outcomes you want from a modern portal.



ServerSys

www.serversys.com



The **Portal** Company

www.theportalcompany.com