

Xpand Portal Connector Overview

Once you deploy the Xpand Portal Connector app for your Microsoft Dynamics 365 Business Central solution, you will be able to configure integration of your solution with Xpand Portal.

The app consists of the following elements:

Portal Connection Setup

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Portal Connection Setup

General

Enabled ☒

User Name admin@portal.com

Company Integration ... DEMO

Password

Web Service URL http://youwebserviceURL

This is a general setup where you toggle integration between Business Central and Xpand Portal on and off as well as set up connection settings: the Business Central company that will be used as a data source on the portal, web service URL, and connection credentials.

Portal Entities

PORTAL ENTITIES | WORK DATE: 1/27/2022

🔍 Search + New Manage Process Import 📄 Open in Excel More options 🔍 ☰

Code ↑	Name	Description	Direction	Status	Last Exported Date-Time	Lz D.
BUSINESSR...	BusinessRelations		Export	Released	5/26/2020 3:14 PM	
CONTACT	Contact		Both	Released	5/26/2020 3:13 PM	5,
CONTACTB...	ContactBusinessRelation		Both	Open	5/26/2020 3:13 PM	5,
COUNTRYR...	CountryRegion		Export	Released	5/26/2020 3:13 PM	
LANGUAGE	Language	Language	Export	Released	5/26/2020 3:13 PM	
POSTCODE	PostCode		Export	Released	5/26/2020 3:13 PM	

Portal entities define what data will be sent to or received from Xpand Portal during data synchronization.

A portal entity can consist of a single or multiple Business Central tables. It is up to you to choose which fields in those tables will be synchronized.



PORTAL ENTITY CARD | WORK DATE: 1/27/2022

CONTACT

Process Import Actions Navigate Fewer options

General

Code: CONTACT Last Exported Date-Time: 5/26/2020 3:13 PM

Name: Contact Last Imported Date-Time: 5/29/2020 10:52 AM

Description: Last Portal Updated Date-Time: 5/25/2020 10:40 PM

Direction: Both

Status: Released

Links +

(There is nothing to show in this view)

Lines Manage More options

Source Type	Source Subtype	Source ID	Source Name	Node Name	Node Value	Import New Values	Update Field on Import
Table		5050	Contact	Contact	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		1	No.	No.	--	<input type="checkbox"/>	<input type="checkbox"/>
Field		2	Name	Name	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5	Address	Address	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		35	Country/Region Code	Country/RegionCode	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		7	City	City	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		91	Post Code	PostCode	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5050	Type	Type	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field	File	140	Image	Image	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field	File	89	Picture	Picture	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		102	E-Mail	EMail	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		9	Phone No.	PhoneNo	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5061	Mobile Phone No.	MobilePhoneNo	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5051	Company No.	CompanyNo	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5052	Company Name	CompanyName	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		50001	Portal Record No.	PortalRecordNo	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5058	Job Title	JobTitle	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Import

Skip Table Triggers on Import ☐

On the entity card, you set up the tables and fields the entity will consist of.

Additionally, there are advanced settings that can be configured for a portal entity enabling you to do the following:

- Select which fields will be synchronized
- Enable field validation for a certain field on data import
- Choose to skip table triggers (Insert, Modify, and Delete) on data import if necessary
- Set up filters to only import data that meets the specified criteria
- Set up primary key default values to define how records will be created in Business Central in case imported data doesn't have primary keys specified

Once you release portal entity, it is ready for data synchronization. There are two ways how synchronization can be performed:



- Manually, directly from a portal entity card. You use the **Export Entity to Portal** and **Import Entity from Portal** actions to export or import entity data correspondingly.

← PORTAL ENTITY CARD | WORK DATE: 1/27/2022 ✎ + 🗑

CONTACT

Process Import **Actions** Navigate Fewer options

Release Export Import

Export Entity to Portal

Code Last Exported Date.... 5/26/2020 3:13 PM

Name Contact Last Imported Date... 5/29/2020 11:01 AM

Description Last Portal Updated... 5/25/2020 10:40 PM

Direction Both

Status Released

Lines Manage More options

Source Type	Source Subtype	Source ID	Source Name	Node Name	Node Value	Import New Values	Valid... Field on Import
Field		5052	Company Name	CompanyName	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		50001	Portal Record No.	PortalRecordNo	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		5058	Job Title	JobTitle	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field		50000	Status	Status	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Table		5054	Contact Business Relation	ContactBusinessRelation	—	<input type="checkbox"/>	<input type="checkbox"/>
Table		18	Customer	Customer	—	<input type="checkbox"/>	<input type="checkbox"/>
Field		1	No.	CustomerNo	—	<input type="checkbox"/>	<input type="checkbox"/>
Field		2	Name	CustomerName	—	<input type="checkbox"/>	<input type="checkbox"/>
Field		86	VAT Registration No.	CustomerVATRegistrationNo	—	<input type="checkbox"/>	<input type="checkbox"/>

Import

Skip Table Triggers on Import ☐

- Automatically by configuring a job queue entry.



Portal Integration Log

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PORTAL INTEGRATION LOG | WORK DATE: 1/27/2022

🔍 Search

📄 Export File

🗑️ Delete Entries...er Than 7 Days

✖ Delete All Entries

🔔 Show Error Message

📄 Open in Excel

More options

🔍

☰

🔔

Entry No. ↓	Direction	Entity Code	Entity Name	Start Date/Time	Finish Date/Time	Error Message
61645	Import	CONTACT	Contact	5/29/2020 11:12 ...	5/29/2020 11:12 ...	—
61644	Import	CONTACT	Contact	5/29/2020 11:11 ...	5/29/2020 11:11 ...	—
61643	Import	CONTACT	Contact	5/29/2020 11:10 ...	5/29/2020 11:10 ...	—
61642	Import	CONTACT	Contact	5/29/2020 11:09 ...	5/29/2020 11:09 ...	—
61641	Import	CONTACT	Contact	5/29/2020 11:08 ...	5/29/2020 11:08 ...	—
61640	Import	CONTACT	Contact	5/29/2020 11:07 ...	5/29/2020 11:07 ...	—
61639	Import	CONTACT	Contact	5/29/2020 11:06 ...	5/29/2020 11:06 ...	—
61638	Import	CONTACT	Contact	5/29/2020 11:05 ...	5/29/2020 11:05 ...	—
61637	Import	CONTACT	Contact	5/29/2020 11:04 ...	5/29/2020 11:04 ...	—
61636	Import	CONTACT	Contact	5/29/2020 11:03 ...	5/29/2020 11:03 ...	—
61635	Import	CONTACT	Contact	5/29/2020 11:02 ...	5/29/2020 11:02 ...	—
61634	Import	CONTACT	Contact	5/29/2020 11:01 ...	5/29/2020 11:01 ...	—
61633	Import	CONTACT	Contact	5/29/2020 11:00 ...	5/29/2020 11:00 ...	—
61632	Import	CONTACT	Contact	5/29/2020 10:59 ...	5/29/2020 10:59 ...	—
61631	Import	CONTACT	Contact	5/29/2020 10:58 ...	5/29/2020 10:58 ...	—
61630	Import	CONTACT	Contact	5/29/2020 10:57 ...	5/29/2020 10:57 ...	—
61629	Import	CONTACT	Contact	5/29/2020 10:56 ...	5/29/2020 10:56 ...	—
61628	Import	CONTACT	Contact	5/29/2020 10:55 ...	5/29/2020 10:55 ...	—
61627	Import	CONTACT	Contact	5/29/2020 10:54 ...	5/29/2020 10:54 ...	—
61626	Import	CONTACT	Contact	5/29/2020 10:53 ...	5/29/2020 10:53 ...	—
61625	Import	CONTACT	Contact	5/29/2020 10:52 ...	5/29/2020 10:52 ...	—
61624	Import	CONTACT	Contact	5/29/2020 10:51 ...	5/29/2020 10:51 ...	—
61623	Import	CONTACT	Contact	5/29/2020 10:50 ...	5/29/2020 10:50 ...	—

Links +

(There is nothing to show in this view)

The portal integration log allows you to monitor what data was sent to or received from Xpand Portal during data synchronization. In case any synchronization errors occur, they will be logged in this window for the admin to easily identify the cause of the issue.

Moreover, from the portal integration log, for each log entry, you can download an XML file where you can see what data exactly was sent or received in that synchronization operation.

