

Installation Guide for Wiise Customer Portals

Wiise Customer Portal uses both Microsoft Business Central/Wiise and Power PowerPages to offer a fast and tailored template for Wiise users to rollout to their customers without extensive development and .com website maintenance. Wiise partners can deploy the Wiise customer portal in Wiise environment and design the interface to match customer branding with little-to no code required. Follow this guide to get Wiise Customer Portals up and running in your environment.

Before you begin

Wiise Business Central Environment: You will need admin access to the Business Central environment you plan to install Wiise Customer portal into.

Power Platform environment: You will need admin access to the Power Platform admin centre.

Both these above environments need to exist under the same Microsoft tenancy.

This solution will require end users to have appropriate Business Central and Power App licensing. Please see the Wiise Customer portal Licensing guide here

Download

Download the Customer Portal files from the Wiise GitHub repository located here get https://github.com/Administrator-Wiise/wiise-customer-portals. Make sure the following two files are | downloaded:

Wiisecustomer portal_X_X_X_X.zip

NOTE: If you are a Wiise partner do not have access to the Wiise GitHub repository please contact support@wiise.com to request access.



Dataverse Connector within Wiise/ Business Central

1 Home > Assisted Setup. Select to Enable data synchronization and Enable virtual tables and events

Home Integration	Virtual Tables Synchronization Cloud Migration	Aore options	
Assisted Setup	Dataverse Connection Setup	2 X	;
Connection fror			
Environment URL -	Quickly set up the connection, couple records, and even synch	ronize data.	
SDK Version	Enable data synchronization		
Advanced Settir	Connect Business Central to Dataverse to synchronize data wit	h other business apps.	
Ownership Model -	Quickly set up Business Central virtual tables in Dataverse and that Business Central sends to Dataverse. Enable virtual tables and events	enable business events	***
	If you choose Next we will try to find your Dataverse environm choose the one to connect to.	ents so you can	

2. Select the Power App Environnent you want to install Wiise Customer portal into then click **OK**

at	averse User Environments	ρ	2	\times
×	Reminder: your work date is 1/04/2024	Use today Change to Turn off reminder		~
	Name †	Linked URL		
\rightarrow	CRONUS	https://orgcfeef0e4.crm6.dynamics.com		
	Wiise Demo (default)	https://org7c1388de.crm6.dynamics.co	m	
	Wiise Demo Sandbox	https://wiisedemo.crm6.dynamics.com		
	Wiise Projects	https://orgc4ededfd.crm6.dynamics.com	n	



3. On this screen you will need to sign with administrator user for the user who has Power App admin access.

Dataverse Connection Setup	2 X
ĘČš	
SET UP THE CONNECTION Specify the URL of the Dataverse environment. Your environments or you can enter the URL.	s appear in the list,
https://org7c1388de.crm6.dynamics.com	I
Sign in with an administrator user account and give consent to th will be used to connect to Dataverse. The account will be used on configure components that the integration requires.	e application that e time to install and
Sign in with administrator user	
To install and configure integration components, choose Next. Th minutes.	is might take a few
Back Nex	kt Finish

4. Once successfully signed in you will be able to select Next

Dataverse Connection Se	etup	2 X
203		
SET UP THE CONNECTION		
Specify the URL of the Dataverse en or you can enter the URL.	vironment. Your enviror	nments appear in the list,
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5. Leave the default settings as shown below and select Next



6. Select Next





7. Now you will be prompted to Install the Business Central Virtual Table app. Click on the **link**



8. This action will take you to the Virtual Table app page in Appsource. Select Get it now





9. This action will now navigate you into the Power Apps admin page and show the side window as below. Select the Power App environment you want to install Wiise Customer Portals into then agree to the terms and conditions then select **Install**

Install Business Central Virtual Table

 \times



Name Business Central Virtual Table

Description

Microsoft Dynamics 365 Business Central Virtual Table is a virtual data source in Microsoft Dataverse allowing Create, Read, Update and Delete operations from Microsoft Dataverse against Dynamics 365 Business Central. Data for virtual tables do not reside...

See more

Publisher

Microsoft

Select an environment *

Wiise Innovation Dev		\ \
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Don't see your environment?

I agree to Microsoft's Legal Terms and Privacy Statement

I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365

Install Cancel



10. You will be able to see the app installing from the Synamics 365 apps page. Please wait till this is fully installed. This process can take between 10-20mins.

Power Platform	n admin ca	mber					
=		👎 Install app 🍈 Open AppSource 🕚 Refresh				,O Search	
© Home		D Business Central Virtual Entity Installation started at 1240 pm. 9	/20/2024 by Har	nish Browne			
A Environments		Environments > Wilse Innovation Dev >	Dynamics	365 apps			
Cal Environment group	15	Check the status of Dynamics 365 apps and manage th	eni acioss you	r oig. <u>Leam more</u>			
O Security		Name 1		Status	Publisher		
🗠 Analytics	~	Agent Productivity Taolo		installed	Microsoft Opnomics 365		
G Billing	~	appprofileranager		inctalled	Microsoft Dynamics 205		
Settings		Business Central Determine Sear Integration		Installed	Microsoft		
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Recources	^	Business Copilar M		installed	Microsoft Dynamics 365		
Capacity		OCI Bota	•••	Installed	Viciosoft Dynamics 305		
Catalogs		Data Archival Previow Offer		Installed	Microsoft Oynamics 365		
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Power Pages sites		Dataverse Accelerator		Installed	Microsoft Dynamics 365		
Q Help + support		Оулитиса Эб5 ОзиллефоретелскАрра		installed	Microsoft Opnamics 365		
🕞 Data integration		Dynamics 365 Channel Integration Framework		installed	Microsoft Dynamics 365		
(b) Data (preview)		Dynamics 265 Controlual-Help		Installed	Microsoft Dynamics 365		
💁 Policies	č	Dynamica 385 Customer Service Analytica		Update available	Microsoft Oynamics 365		

11. Once the app is installed, go back to the previous Business Central window that has the Dataverse Connection Setup page and hit Refresh to confirm the visual tables are now installed



20.Click on the review and enable the virtual tables link



12. A new page will open showing the virtual tables and allowing you to make changes to visibility. The following tables will need to be set to **Enable**.

a.Account

b.salesinvoice

c.salesinvoice line

d.salesorder

e.salesorder line

salesInvoice	:	Sales Invoice	₽.	v2.0	53	
salesInvoiceLine		Sales Invoice Line		v2.0	83	0
salesOrder		Sales Order		v2.0	83	0
salesOrderLine		Sales Order Line		v2.0	83	0

13. This process will take a while. You can click on Refresh to see the progress. You will know the process is complete when all the above tables show the Visible checkmark

Availabl	le Virtual Tables - Dataverse: All \checkmark \bigcirc	📌 Enable 🖸 Refresh 🛛 📟 Open in Datavers	se	Ŀ	7 🗉 🖉
0	Name 1	Enables the selected virtual tables in Dataverse environment.	API Route	Visible	In Process
\bigcirc	purchaseOrderLine	Purchase Order Line	v2.0		
\bigcirc	purchaseReceipt	Purchase Receipt	v2.0		
\bigcirc	purchaseReceiptLine	Purchase Receipt Line	v2.0		
0	retainedEarningsStatement	Retained Earnings Statement	v2.0		
\bigcirc	salesCreditMemo	Sales Credit Memo	v2.0		
\bigcirc	salesCreditMemoLine	Sales Credit Memo Line	v2.0		
0	salesInvoice	Sales Invoice	v2.0		
Ø	salesInvoiceLine	Sales Invoice Line	v2.0		
0	salesOrder	Sales Order	v2.0		
Ø	salesOrderLine	Sales Order Line	v2.0		
0	salesQuote	Sales Quote	v2.0		
Ø	salesQuoteLine	Sales Quote Line	v2.0		
0	salesShipment	Sales Shipment	v2.0		
0	salesShipmentLine	Sales Shipment Line	v2.0		

14. When finished select the back arrow. When back in the Dataverse Connection Setup window select **Finish**



Dataverse Connec	tion Setup			2	×
					•
SET UP VIRTUAL TABLES					
Set up Business Central Vir Business Central to send bu	tual Tables app usiness events	in a Dataverse to Dataverse.	e environment to	allow	
Use the link below to go to	AppSource ar	nd get the the	Business Central	Virtual	- 1
Table app, so you can insta after you install, click back	ll it in your Dat and next.	averse enviror	nment. To refresh	status	- 1
Install Business Central Virt	ual Table app				- 1
The Business Central Virt	ual Table app	is installed.			- 1
Review and enable virtua	l tables				- 1
Choose Finish to set up the configure virtual tables in y	e connection fr our Dataverse	om Dataverse environment.	to Business Cent	ral and	C
	Back	Next	Refresh	Finis	h



15. Back on the main screen select Home > Test Connection to verify the link has now been established.

-	
Dataverse Connec	ction Setup
× Reminder: your work date is 1/04/2024	Use today Change to Turn off reminder
Home Integration Virtual Tables Synch	nronisation Cloud Migration Actions \lor Automate \lor Fewer options
Assisted Setup 💭 Test Connection	Use Certificate Authentication
Connection from Dynamics 365 Busin	Enable Data Synchron
SDK Version	100 Enable Virtual Tables
Integration Solution Settings	
Integration Solution Settings Solution Version	Team Roles checked · · · · · Yes
Integration Solution Settings Solution Version 18.0.24800.30033 Dataverse Version che Yes	Team Roles checked Yes Entities availability ch Yes
Integration Solution Settings Solution Version 18.0.24800.30033 Dataverse Version che Yes User Roles checked Yes	Team Roles checked Yes Entities availability ch Yes
Integration Solution Settings Solution Version 18.0.24800.30033 Dataverse Version che Yes User Roles checked Yes Advanced Settings	Team Roles checked · · · · Yes Entities availability ch Yes

To test the effective connection between the Wiise data and the Dataverse virtual tables could be completed, in the below steps this is completed with the customer to account sync

16. First add a new customer record

W	se	Dynamics 365				Production		- w	
\leftarrow	Customers Work	k Date: 1/04/2024						ೆ ಸ್	
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	🐺 Register Cu	stomer Payments 🛛 🖃 Ser	id Email 🛛 🗂 Apply Template					%	
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	10000	Adatum Corporation		Anthony Lording	SA	DOMESTIC	0.00		
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	30000	School of Fine Art		Meagan Bond		FOREIGN	95,193.00	5	;
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	50000	Relectoud		Mason Kingsley	TAS	DOMESTIC	15,770.00	1	i.
	<u>60000</u>	Customer portal example	9			DOMESTIC	0.00		



17. Navigate to Dataverse setup and select Dataverse Full Synch Review

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	Dataverse V	POSTEDSAL PROJECTTASK			The synchronisation will run in To check the status, return to th	the background, so you his page or refresh it.	u can continue with o	other tasks.				
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18. Navigate to Dataverse setup and select Dataverse Full Synch Review

🗰 Dynamics 365 Bi	usiness Central							Environment: @ P D	? NH
CRONUS USA, I	nc. Finance	 Cash Ma 	nagement ~	Sales ∨	Purchasing	Shopify	~ All	Reports 📃 🚍	
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Start Date/Time ↓	Coupled	Inserted	Modified	Deleted	Unchanged	Failed	Skipped	Direction	Туре
<u>10/25/2024 11:45</u>	0	11	0	0	0	0	0	Payment Terms to Dynamics CRM account.	Synchronization
10/25/2024 11:45	0	0	1	0	0	0	0	Shipment Method to Dynamics CRM account.	Synchronization
10/25/2024 11:45	0	14	0	0	0	0	0	Shipment Method to Dynamics CRM account.	Synchronization
10/25/2024 11:44	3	0	0	0	0	0	0		Coupling
10/25/2024 11:44	0	0	0	0	0	0	0		Coupling
10/25/2024 11:44	0	3	0	0	0	0	0	Currency to Dynamics CRM transactioncurrency.	Synchronization
10/25/2024 11:44	1	0	0	0	0	0	0		Coupling
10/25/2024 10:39	0	0	0	0	0	0	0	Dynamics CRM contact to Contact.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Contact to Dynamics CRM contact.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Dynamics CRM account to Vendor.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Shipment Method to Dynamics CRM account.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Vendor to Dynamics CRM account.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Shipping Agent to Dynamics CRM account.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Payment Terms to Dynamics CRM account.	Synchronization
10/25/2024 10:39	0	0	0	0	0	0	0	Dynamics CRM account to Customer.	Synchronization

Install the Wiise Customer portal app into Power Apps

- 1 As a Power App administrator navigate to Power pages and select the environment you are installing to the Wiise Customer Portals app into.
- 2 Select Solution from main navigation and then select Import solution from top navigation

	Power Apps	₽ Search	_				âñ	Vise Innovation Dev	ф	۲	?
=		$+$ New solution \leftrightarrow Import solution	0	Open AppSource	Publish all ou	stomizations	🖪 Set pre	ferred solution	,P	Search	
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00	Flows	Default Solution		Default	5 days ago	1.0		Default Publisher	Not suppor	ted for ana	sly
8	Solutions										
80	Dataflows										
de la	Connections										
	More										
P	Power Platform										

3. Select the Customer portal zip file you download from GitHub earlier then select Next

Х

Import a solution Environment Wiise Innovation Dev

Select a file

Browse for the solution file to import.

Browse

Wiise_Customer_Portal_1_0_0_3.zip



Try pipelines for effortless imports

Use pipelines to simplify and automate the deployment process in your organization. Pipelines is a feature of Managed Environments. Learn more

Cancel



4. Select Next again

← Import a solution	×
Environment	
Wise Demo Sandbox	
Details	
Name	
Wiise_Customer_Portal	
Туре	
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Enable Plugin steps and flows included in the solution	
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5. Click on Import

Import Cancel

6. The solution is now importing. This will take 10-20mins

7. Once installed, navigate to Apps on the main menu. You should now see the new app installed. Wiise Customer Portals

wiise	Power Pages						
=	+ New solution ← Import solution 🍈 Open AppSource	Publish all customizations					
G Home	Currently importing solution "Wiise Customer Portal".						
🗰 Templates	Solutions						
🔲 Learn	Solutions Publishers History						
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6 ² Power Platform	Wiise Customer Portal	Wiise_Customer_Port	1 week ago	1.0.0.3	No	CDS Default Publisher	Results as of 8:51 AM, 11/7/24
	Dynamics 365 Field Service PowerApps Portal	msdyn_FieldServiceP	1 month ago	1.0.0.1036	Yes	Dynamics 365	Checked by publisher
	Dynamics 365 Field Service PowerApps Portal	msdyn_FieldServiceP	1 month ago	1.0.0.1036	Yes	Dynamics 365	Checked by publisher
	FieldServiceDemo	FieldServiceDemo	1 month ago	1.0.0.8	No	Wiise	Results as of 9:23 AM, 10/29/24



8. Click on both apps and select **Publish** from the top menu.

iii wiise	Power Pages							A Wise Demo Sandbox	a ⁰ C	© ?	۲
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The Wiise Customer Portal Page is now live. You last step will be to share both apps to the relevant users as per Microsoft's guidance found here

https://leam.micrqsqft.cqm/en-us/power-apps/maker/mQdel-driven-apps/share-modeldriven-app



Synchronization of the Sales orders using Sync relationships

Next we will take the data from with Wiise and associated it to relevant pages with in the Customer portal solution now imported, and include synthectic relationships so there is an authentication level protection on each of those pages.

1. select Site and choose, inactive sites and choose the solution just imported via edit

III wiise	Power Pages						A Wiise Rapid In	novation 🖉	° 0 🖗	? 💽
=	$+$ New solution $ \mathscr{O} $ Edit 📋 Delete $ \mapsto $ Export solution	🖋 Deploy 🥹 Solution check	er \vee 🖧 Show dependencie	is 🕔 See history	🗈 Clone 🗸 🗸 Apply Upgra	ide 🦽 Translations 🖂	Settings + Publish to Cata	ilog ···	, P Searc	h
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6- Power Platform	 Wiise Customer Portal 	Wilse_Customer_Port	43 minutes ago	1.0.0.4	No	CDS Default Publisher	Hasn't been run	& Not Connected	to Git	

2. Select the site and you will have to move the site from inactive to active

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	Site Component (137)	_								
	🗈 Site Language (1)									
	🖾 Site maps (1)									
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3.

The Synchronization jobs copied Contact, Account and other details from Business Central to Dataverse

4. In Dynamics 365 Business Central, a Sales Order is a document that represents a customer's intent to purchase goods or services from a company. It is a crucial component of the sales process and serves as a foundation for managing customer interactions, tracking orders, and fulfilling customer requests.

Dynamics 365 Business Central			Producti	on D	Q	Q	ŝ	?	NH
CRONUS USA, Inc. Fin	Tell me what you want to do		∠ ×						
Customers Vendors Items	sales order						2		
	Go to Pages and Tasks		Show all (10)				\sim		
Get started	> Sales Orders	Lists	Д				~		
Hi, meet Busine	> Sales Return Orders	Lists							
You're all set to try out ou	> Blanket Sales Orders	Lists							
Go explore on your own, a	Go to Reports and Analysis		Show all (9)						

5. I navigated to the Sales Orders list

 Dynan	nics 365 Busin	ess (Central							Environment: Production	Ø	Q	Q	ŝ	?	NH
\leftarrow	Sales Orders												Add boo	م ^{لا} kmark t	o your Rol	e Center
	Sales Orders:	All	~ @~		Manage	Home	🗟 Release 🗸 🗸	🛅 Post 🗸 🗸	Print/Send	Order		¢.	7 ≣	0		
	No. †		Sell-to Customer No.	Sell-to Customer Name		External Document No.	Location Code	Assigned U ID								
	<u>S-ORD1010</u>	÷	10000	Adatum Corporation					(i) Details	🛛 Attach	ments	(0)				
	S-ORD1010		10000	Adatum Corporation					Customer	Statistics						
	S-ORD1010		30000	School of Fine Art												
	S-ORD1010		40000	Alpine Ski House					Customer No	Э.			10000)		
	S-ORD1010		10000	Adatum Corporation		Y-3	YELLOW		Balance (\$)	s Vendor			0.00	,		
	S-ORD1010		10000	Adatum Corporation		Y-4	YELLOW		Datance (\$) P	G VENGOI			0.00	,		
	S-ORD1010		10000	Adatum Corporation		Y-5	YELLOW		Sales	Orders (\$)			23 856 08			
	S-ORD1010		10000	Adatum Corporation		W-1	WHITE		Shipped Not	Invd. (\$)			0.00)		
	S-ORD1010		10000	Adatum Corporation		SVC-1	MAIN		Outstanding	Invoices (\$)			19,184.20)		
									Payments							
									Payments (\$))		2	32,466.11			
									Refunds (\$)				0.00)		
									Last Paymen	t Receipt Date		3	3/23/2023	3		

6. I reviewed the Sales Orders list

	Power Apps	,⊂ Sea	rch				۱	invironment Develop	Q ©	? (NH
≡		+ New table	e 🗸 🗈 Open 🗸 🖉 Ed	dit \checkmark	\leftarrow Import \lor I-	$ ightarrow$ Export \checkmark	🔅 Properties 🗔 Pub	olish ···	,	×
G	Home	Tables								
+	Create	Tables								
	Learn	-	Create new tables		-					
₿	Apps	₽₽	Use AI or make tables yourse blank, SharePoint lists, Excel, files	elf from , or .CSV	d d	Create a virt	ual table			
₩	Tables		mes.							
oro	Flows	גר Recomn	mended 🖽 Custom	III All						
2	Solutions									
Ø	Al hub	E	Table \uparrow \checkmark		Name \vee	Type \vee	Managed \vee	Customized \vee	Customizable \smallsetminus	Tags \vee
0	Chatbots		Sales Invoice	÷	dyn365bc_salesi	Virtual	Yes	No	Yes	Standard
	More		Sales Invoice Line	÷	dyn365bc_salesi	Virtual	Yes	No	Yes	Standard
P	Power Platform	0	Sales Order	÷	dyn365bc_saleso	Virtual	Yes	No	Yes	Standard
			Sales Order Sales Order Line	÷	dyn365bc_saleso	Virtual	Yes	No	Yes	Standard
			Sales Quote	:	dyn365bc_salesq	Virtual	Yes	No	Yes	Standard
			Sales Quote Line	:	dyn365bc_salesq	Virtual	Yes	No	Yes	Standard
(2)	Adva vietual acost									

Adv. powerapps.com/environments/8fd7eb40-0ea0-eaf3-82cd-a45sadbe0114/entities#
 I navigated to the Sales Order Virtual Table

	Power Apps	✓ Search		Environment Develop	¢	ŝ	?	NH
=		+ New ∨ 🖉 Edit ∨ 🛱 Create an app 🕆 Usin	g this table $\ \leftarrow$ Import $\ \lor \ \mapsto$ Export $\ \lor$	🛱 Advanced \checkmark 📋 Delete				
ଜ	Home	Type Q. K	Kevs 🖽 Dashbo	ards				
+	Create	vii tuui						
	Learn	Sales Order columns and data		🖽 Update forms and view	5 6	^ፇ Edit	$ $ \vee	
₿	Apps							-
₩	Tables							
oro	Flows	S-ORD101001						
8	Solutions	S-ORD101002						
ß	Al hub	S-OKD101003						
00	Chatbots	S-ORD101004						
	More	S-ORD101005						
_		S-ORD101006						
₽	Power Platform	S-ORD101007						
		S-ORD101008						
		S-ORD101009						
		Enter text						
2	Ask a virtual agent							

8. I was able to see the same records

←	→ C S make.power	rapps.com/environmer	nts/8fd7eb40-0ea0-eaf3-82cd-a45aa	adbe0114/entitie	s/e35a5b9d-5493-ef1	1-8a6a-6045bd04be1b		☆	😩 :
	Power Apps		Ø Search			色 Dev	onment elop	Q 🕸	? (NH
=	+ New 🗸 🖉 Edit	✓	\blacksquare Using this table $\ \leftarrow$ Import $\ \lor$	\mapsto Export \vee	🕅 Advanced 🗸 📋 D	elete			
ଲ +	Tables > Sales Ord	er							
	Table properties		🔅 Properties	\boxplus Tools \vee	Schema 🛈	Data experiences	Cu	stomizations 🛈	
B	Name	Primary column	Description		A Columns	∃ Forms	8.0	Business rules	
	Sales Order	No. Last modified			∾a Relationships	Views		Commands	
oro	Virtual	40 minutes ago			🖓 Keys	🗄 Dashboards			
8	I Sales Order colur	mns and data					B Update forms and	l views 🖉 Edit	
CD							,		
8	^{Abc} No. ↑ ∽		Att Customer No. Y	Abd Customer	Name 🗸	Att External Document No. Y	🔃 Order Date 🗎	+37 more > +	
	S-ORD101001		10000	Adatum Corp	oration		4/2/2023		
?	S-ORD101002		10000	Adatum Corp	oration		5/1/2023		
	S-ORD101003		30000	School of Fine	e Art		4/22/2023		
	S-ORD101004		40000	Alpine Ski Ho	use		5/13/2023		
	S-ORD101005		10000	Adatum Corp	oration	Y-3	6/1/2022		
	S-ORD101006		10000	Adatum Corp	oration	Y-4	6/1/2022		
2	S-ORD101007		10000	Adatum Corp	oration	Y-5	6/1/2022		

I added columns to the display Solution I created a Power Platform Solution

	Power Apps		New solution $\qquad \qquad \qquad$
=		+ New solution 🗧 Import solution 🍵 Open AppSource 🛱 Publish all customizations 🖻 Set preferred solution 🕲 See history	Display name *
ର	Home	Solutions	Customer Portal
$^+$	Create		Name *
	Learn	Domanaged Mahaged N All	CustomerPortal
₿	Apps	Display name \checkmark Name \checkmark Created $\downarrow \checkmark$ Version \checkmark P	Publisher *
	Tables	Microsoft Business Central VT Anchor : Microsoft BusinessC 1 week ago 1.0.24179.1 D	Neil Haddley (NeilHaddley)
oro	Flows	Dynamics 365 Business Central Virtual Tables : MicrosoftBusinessC 1 week ago 1.0.0. D	+ New publisher
2	Solutions	Dynamics 365 Business Central ERP Catalog : MicrosoftBusinessC 1 week ago 1.0.24179.1 D	Version * 1.0.0.0
ß	Al hub	Dynamics 365 Business Central Virtual Table Su MicrosoftBusinessC 1 week ago 1.0.24179.1 D	More options V
Ð	Agents	Dynamics 365 Company Dynamics 365 Comp 1 week ago 2.0.777.412 M	
	More	Microsoft Dynamics 365 Business Central Data bcbi_CdsBaseIntegr 1 week ago 24.0.25868.0 M	
?	Power Platform	Power Apps Checker Base msdyn_PowerApps 2 weeks ago 2.0.0.11 D	
		Power Apps Checker : msdyn_PowerApps 2 weeks ago 2.0.0.11 D	
		Contextual Help Base : msdyn_Contextual 3 weeks ago 1.0.0.0 D	
		Contextual Help : msdyn_Contextual 3 weeks ago 1.0.0.0 D	
(?)	Ask a virtual agent		Create Cancel

9. Created a **Customer Portal** Solution

	Power Apps	<u>ھ</u>	Environment Develop		¢	\$
=	Objects <	$+$ New \vee $red Add existing \vee \leftrightarrow Import \vee \mapsto Export \vee extsf{D} Analyze \vee red Publish all customizations \cdots$, ○ Search		
\leftarrow	✓ Search					
		Customer Portal > Tables				
	ф Agents (0)	$\blacksquare {\sf Table} \uparrow \lor \qquad \qquad {\sf Name} \lor \qquad {\sf Type} \lor \qquad {\sf Managed} \lor \qquad {\sf Customized} \lor$	Customizable \vee	Tags \smallsetminus		
'=:						
5	Cards (0)	\frown				
0	⊳⁄ ^a Cloud flows (0)					
59 8	Tables (0)					
		We didn't find anything to show here				

10. I navigated into the new solution

			Add existing tables ×					
=	Objects <	+ New 🗸 🖻	Select tables from other solutions or tables that aren't in solutions yet. Adding tables that aren't already in solutions will also add them to Dataverse.					
\leftarrow	✓ Search		2 tables selected		\bigcirc Sales Order \times			
	IΞ AII (0)	Customer Po	⊘ Display name ∨	Name	Managed \vee			
	ф Agents (0)	IE 1	Sales Order	··· dyn365bc_salesorder_v2_0	Yes			
1 .	P Apps (0)		Sales Order Line	··· dvn365bc salesorderline v2.0	Yes			
50	E Cards (0)			,				
0	$_{\rm D}$ Cloud flows (0)							
357	III Tables (0)							
			Next Cancel					



11. I added the Sales Order and Sales Order Line tables

	Power Apps		\leftarrow Selected tables			×
=	Objects <	$+$ New \vee 🖻	Select objects to your selected tables. 2 tables will be added to your project			
\leftarrow	✓ Search		Sales Order			
	₩Ē AII (0)	Customer Po	1 column selected Edit objects	Include all objects	Include table metadata	×
	d Agents (0)	IE 1				
'≡			Sales Order Line No objects selected	Include all objects	Include table metadata	×
5	Cards (0)		Edit objects			
0	$B^{\prime \alpha}$ Cloud flows (0)					
39	I Tables (0)					

12. Two tables will be added to the solution

	Power Apps View					Environment B Develop	Q @ ? (NH)
\leftarrow	Back + View column 🖽 Components	기 Undo 🤆 Redo	Switch to cla	ssic		🕑 Validate	${\ensuremath{\mathbb P}}$ Save As $\ensuremath{\ensuremath{\mathbb B}}^{1}$ Save and publish $\ensuremath{{}}\xspace{{}}$
=	Table columns $\qquad \times$	∥No. ∨	Order Date \vee	\parallel Total Amount Including Tax $ imes$	Customer Name \vee	Ship-to Address Line	Portal All Sales Orders
Abc	Sales Order Related	S-ORD101001	4/2/2023	17,773.66	Adatum Corporation	192 Market Square	
	\wp Search ∇ \checkmark	S-ORD101002	5/1/2023	2,422.42	Adatum Corporation	192 Market Square	Name *
	+ New table column	S-ORD101003	4/22/2023	5,545.17	School of Fine Art	10 High Tower Green	Portal All Sales Orders
	Bill-to Address Line 1	S-ORD101004	5/13/2023	610.22	Alpine Ski House	10 Deerfield Road	Description
	Bill-to Address Line 2	S-ORD101005	6/1/2022	150.00	Adatum Corporation	192 Market Square	
	Bill-to Country/Region Code	S-ORD101006	6/1/2022	600.00	Adatum Corporation	192 Market Square	
	Bill-to Customer No.	S-ORD101007	6/1/2022	450.00	Adatum Corporation	192 Market Square	Sort by
	Bill-to Name	S-ORD101008	6/1/2022	60.00	Adatum Corporation	192 Market Square	
	BillTo State	S-ORD101009	6/1/2022	2,400.00	Adatum Corporation	192 Market Square	No filters are present.
	, ○ Company						√ Edit filters
	At Company Code						

13. I added a Portal All Sales Orders view to the Sales Order table

	Power Apps View			壆	Environment Develop	Q @ ? NH
\leftarrow Ba	ck 🕂 View column 🖽 Components	Undo 🤆 Redo 🛛 🗂 Switch to classic			🕑 Validate	\blacksquare Save As \blacksquare Save and publish \lor
=	Table columns ×	\parallel Quantity \checkmark \parallel Unit Price \checkmark	$\ $ Invoiced Quantity $ imes$	Amount Including Tax $^{\smallsetminus}$	Shipmer	Portal All Sales Order Lines
	Sales Order Line kelated			Data preview not a Pata preview not a There was an error retrieving you your filters and try) available ur data. Please check again.	Name * Portal All Sales Order Lines Description Sort by Sort by Sort by Y Hot filters are present. Y Edit filters
	Abd Line Object No.					

14. I added a Portal All Sales Orders Lines view to the Sales Order Line table

	Power Apps Form	色 Develop	Q @ ? (NH)
$\leftarrow \epsilon$	Back 🏷 🦿 🐰 🛍 🗸 🗊 Delete	🖼 Form field 🗄 Component 🛃 Form libraries 🗞 Business rules 🔋 Form properties 🗟 Form settings \cdots	🕞 Save a copy 📋 Save and publish $ imes $
=	Table columns ×	New Sales Order	Portal Sales Order Main Form
₿		Sales Order	Main form
Abc	+ New table column	General Related V	Properties Events
	Show only unused table columns		Table
8	Bill-to Address Line 1	No	Sales Order
35	🔤 Bill-to Address Line 2		Display Name
ç	Bill-to City	Order Date	Portal Sales Order Main Form
\$-0	Bill-to Country/Region Code	+ New Sales Order Line	Description
	Bill-to Customer No.	General	A form for this entity.
	🔤 Bill-to Name	Quantity V Unit Price V Invoiced Quantity Amount Including	
	🔤 Bill-to Post Code		Max Width (pixels)
	BillTo State	No data available	1,920
	✓ Company		Show image
	🔤 Company Code		
	🔤 Currency Code		
	🔤 Customer Name	0 - 0 of 0 I ← Page 1 →	
	🔤 Customer No.		
	0.0 Discount Amount		
	Discount Applied Before Tax	[7]. Responsive (819 x 595) ∨ Show hidden ● Off + 100 % d	j.

15. I added a Portal Sales Order Main Form to the Sales Order table

	ower Apps Edit Ap			Environment Develop		Q		
\leftarrow Back	: 🛛 🕂 Add page 🛭 🝕	🖇 Settings 🛛 …						\triangleright
Pages	Pages	+ New			Арр			>
100 Data								
Automation			New model-driven app					
			Name *					
			Sales Orders					
			Description					
			✓ Advanced					
			Create					
			Croit					

16. I added a Sales Orders application to the solution

III Po	ower Apps Sales Ord	lers	Environment 盘 Develop	₽ 	NH
\leftarrow Back	K 🕂 🕂 Add page 🛛 🛞	Settings ····			⊳
Pages	Pages	+ New		Sales Orders	>
Data Sea Automation	✓ Search Navigation All other pages	 Select a table Create new tables Sales Sales Order Sales Order Line Salesforce Structured Object Salesforce Structured QnA Config Show in navigation Add Cancel 	Start by adding a page to your navigation	Solution Customer Portal App name Sales Orders Description Briefly describe what this app do Icon Default icon App tile preview Sales Orders	ies
ė		Fill Responsive (801 v 597)	- - - + 100 % &		



17. I added the Sales Order table to the Sales Orders application



18. I clicked the **Play** button

	Power Apps	Sales	Orders						$P + \Delta$	\$\$? (NH
= ☆	Home				+ New 볩 Delete	🗸 🖔 Refresh 📲 Visual	ize this view 🛛 🖓 Email a Link	〜 🏼 Flow 〜 🗐 Run Rep	port ~ :	🖄 Share 🗸
©	Recent	×	Porta	I All Sales O	rders \vee			😨 Edit columns 🛛 🍸 Edit	t filters 🔎 Filter by k	eyword
New	Group			No. ~	Order Date ~	Total Amount Including Tax $^{\sim}$	Customer Name ~	Ship-to Address Line 1 ~	Status ~	
(C)	Sales Orders			<u>S-ORD1010</u>	4/2/2023	17,773.66	Adatum Corporation	192 Market Square	Draft	
				S-ORD101001	5/1/2023	2,422.42	Adatum Corporation	192 Market Square	Draft	
				S-ORD1010	4/22/2023	5,545.17	School of Fine Art	10 High Tower Green	Draft	
				S-ORD1010	5/13/2023	610.22	Alpine Ski House	10 Deerfield Road	Draft	
				S-ORD1010	6/1/2022	150.00	Adatum Corporation	192 Market Square	Draft	
				S-ORD1010	6/1/2022	600.00	Adatum Corporation	192 Market Square	Draft	
				S-ORD1010	6/1/2022	450.00	Adatum Corporation	192 Market Square	Draft	
				S-ORD1010	6/1/2022	60.00	Adatum Corporation	192 Market Square	Draft	
				S-ORD1010	6/1/2022	2,400.00	Adatum Corporation	192 Market Square	Draft	

19. I selected a Sales Order

EVALUATE: Power Apps Sales	Orders	タ + マ 🐵	? (NH
☴ 命 Home	← 🗄 🖬 Save 🛱 Save & Close + New 🛍 Delete 🖒 Refresh 🔍 Check Access 🔊 Flow ∨ 🕏 Word Templates	e ا	Share ~
© Recent ∨ ☆ Pinned ∨ New Group	S-ORD101001 - Saved Sales Order · Portal Sales Order Main Form ~ General Related ~		
යි Sales Orders	Related No. S-ORD101001 Order Date 4/2/2023	+ New Sales Order Line	
	Quantity ~ Unit Price ~ Invoiced Quantity ~ Amount Including Tax ~ Shipment Date ~ 12.0000 1,397.300000000 0.000000000 17,773.6600000000 4/2/2023	Description ~	-
	Rows: 1	_	



20. I reviewed the Sales Order Lines associated with the selected Sales Order



21. I edited the Quantity, Unit Price, Invoiced Quantity and Amount Including Tax table columns



22. I updated the number of Decimal places



	Power Apps	Sales	Orders							م	+	7	ŝ	?	NH
≡ ଜ	Home		÷	ď	🖬 Save 👹	Save & Close $+$ New	🗓 Delete 🖒 Refresh 🔍	, Check Access $$ $$ $$ Flow $$ $$:				Ŕ	Share	×
© \$	Recent Pinned	$\stackrel{\sim}{\sim}$	S-C	ORD1(es Order	D1001 - Saved Portal Sales O	rder Main Form $ au $									
Nev C∂	v Group Sales Orders		Ger	neral	Related \checkmark										
			No.			S-ORD101001									
			Orde	er Date		4/2/2023								::	
										+	New S	Sales Ord	ler Line	:	
					Quantity ~	Unit Price $^{\vee}$	Invoiced Quantity ~	Amount Including Tax $^{\scriptscriptstyle \vee}$	Shipment Date ~	Des	criptior	۱×			
					12	1,397.30	0.00	17,773.66	4/2/2023	ATL	ANTA V	Vhiteboa	rd, base		
			R	ows: 1											

23. I reviewed the Sales Order Lines associated with the selected Sales Order

E Power Pages			Develop & Q @ ?	NH
Home	Start building your website Create a site to manage project proposals Design a website for con	with (Select environment Spaces to create, store, and work with data and apps.	× ⁄
Learn	Describe the site you want and let AI create the first draft		 Power Pages Environments (2) haddley.com (default) 	
🥭 Power Platform	Make sure Al-generated content is accurate and appropriate be Other ways to create a site	fore using it. <u>See t</u> Start from bla	Other Environments (0)	
	Select from a gallery of premade site templates to get your site going.	itart from a blan		

24. I navigated to https://make.powerpages.microsoft.com/







26. The new site was setup





27. I added a Sales Orders page

::: Power Pages			& ⁵ Q ⊗ ? (NH
â	Se Customer Por	rtal - Private - Saved 🖂	🍯 🗓 💭 🛛 🔿 Preview 🗔 Sync
Pages + Page	<i>ର ବ</i> ନ୍ଧ	Kit code 🛛 🍳 🗸 🖉	🔹 Copilot 🛛 🕹
Styling Main navigation	Page settings	×	
Control Contr	Details Permissions	 Anyone can see this page I want to choose who can see this page Authenticated Users Manage roles Apply these permissions to all files inherited by this page 	Copilot Hi Neil, what can I help you with? Page design Create page, section, and themes Data forms Work with your business data C Ask Get answers to your questions
		OK Cancel	Choose a starter prompt, request an action, or ask a question Bing search is disabled Make sur Al-generated content is accurate and appropriate before

28. The Sales Orders page will only be shown when an authenticated user is logged in



29. I added an h1 Text component. I added a List component

EE F				Ø ⁵ Q @ ? (NH)
ଜ		$a_{ m B}^{ m C}$ Customer Portal - Private - Saved \sim		💋 🗓 💭 🛛 🔿 Preview 🕞 Sync
Pages	Pages + Page 9	् अष्टि स्वीर त	ode @ v .7	Copilot ×
Styling Data Data Set up Security	Main navigation Home Sales Orders A ··· Other pages Po Access Denied Page Not Found	Add a list * Al Insights Let your customers get deeper insights from data by enabling for your list. Learn more See preview terms This list will display information to your site visitors from the da the table and views. This list can be edited and reused. Choose a table * Sales Order Select the data views *	g Al Insights ata stored in	Copilot Hi Neil, what can I help you with? Page design Create page, section, and themes Data forms Work with your business data
		Portal All Sales Orders Name your list * All Sales Orders Done	Cancel	Ask Get answers to your questions Choose a starter prompt, request an action, or ask a question Sing search is disabled Common Augemented content is accurate and appropriate before uning a Signame

30. I selected the **Sales Order** table. I selected the **Portal All Sales Orders** view. I named the List **All Sales Orders**.

Ш Р	ower Pages						pilot 🖉 🗘	? (NH)
â		ŝ	Customer Portal - Priva	te - Saved 🗸		C	🖞 🗓 💭 🔿 Previe	w 🕞 Sync
Pages	Pages + Page	9 0 B					🗙 Edit code 🛛 🔍	~ 27
Styling	Main navigation	Ó	Company n	ame				
	☆ Home							
Data	🗋 Sales Orders 👌 🛛 …							
Set up	Other pages							
Security	₽ Access Denied	00	Edit list = Add filter	r 🗸 🛛 📴 Edit views 🗸	Ca Permissions			
	🏷 Page Not Found	() s	et the permission on this li	st so it can be seen and used b	Permissions y all of your site visitors.		+ New permission	
		No.	Order Date	Total Amount Including Tax	Customer Name	Ship-to Address Line 1	Status	
		This exan of a singl of te	is an mm/dd/yyyy nple le line xt	0.00	This is an example of a single line of text	This is an example of a single line of text	These are sample choices	
		This exan of a sing of te	is an mm/dd/yyyy nple le line xt	0.00	This is an example of a single line of text	This is an example of a single line of text	These are sample choices	R
		This	is an mm/dd/yyyy	0.00	This is an example of	This is an example of	These are sample	

31. I added permissions

III Po	ower Pages					B Develop	
ົດ		Se Custo	omer Portal - Priva	ate - Saved 🗸		New table permission	
Pages	Pages + Page	2 6 8				Basic Child permissions	
Ç tyling	Main navigation	🔘 Co	mpany r	ame		Name *	_
Ē	命 Home					Account Sales Orders	
ata	🗋 Sales Orders 👌 🛛 …					Table *	
t up	Other pages					Sales Order	,
New	& Access Denied	000 Edit list	: = Add filte	r $ imes \Big \overline{\hspace{-1.5pt} m I \hspace{-1.5pt} m P} $ Edit views $ imes $	🖧 Pe	Access type *	
		(i) Set the p	permission on this li	st so it can be seen and used l	by all of yo	Show rows in the table associated to the signed-in user's account details. Learn more	_
				Total Amount Includian		Relationship *	
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		This is an	mm/dd/yyyy	0.00	This is	+ New relationship ⊑²	l
		of a single line of text			a sing	Related tables	
		This is an example of a single line of text	mm/dd/yyyy	0.00	This is a sing	· · ·	
		This is an	mm/dd/yyyy	0.00	This is	Save	J

32. I added a table permission. The permission will allow users to see Sales Order rows that are associated with their company (Account).

 Dynamics 365 Business Centr	al 🛃 Environme	t q	D	Q	Q	¢3	NH
CRONUS USA, Customers Vende						2	
Get started Hi, m	Home Integration Virtual Tables Synchronization Cloud Migration More options ** Virtual Tables AppSource App ** Available Virtual Tables ** Synthetic Relations ** Virtual Tables Config ** Virtual Tables Microsoft Entra App ** Wew the synthetic relations available				2	×	
You're all set explor	Connection from Dynamics 365 Business Central to the Dataverse environment Environment URL https://org65974739.crm.dyna SDK Version 100			>			

33. I added a Synthetic Relation

 Dynamics 365 Business Central			Environment: Production	Ð	م	Q	ŝ	?	NH
c < <	Synthetic Relations								
° Dat	Ø ∨ . Ø	How III Domain C Dafrach	┢ ७ ≣				2		
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-s ^{2e} Virt	CRM Systemuser	systemuser							
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	CRM Contact	contact							
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integra									
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User Role		ок	Cancel				_		
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34. The Synthetic Relation connects CRM Account records...

 Dynamics 365 Bu	siness Central				Environment: Production	Ð	Q	Ω	ŝ	(NH)
c (~	~	Synthetic Relations								
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	Home	Relation Setup $P \sim$			2 ×			>	<	
	a [#] Virt									
	🗚 Virt	Name		Logical Name 1						
		→ <u>Sales Order</u>	:	dyn365bc_salesorder_v2_0						
	Connec	Sales Order Line		dyn365bc_salesorderline_v2_0						
	Environm									
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35. ... to Sales Order records

W Dynamics 365 Bu	siness Central			Environment: Production	ወ ዖ	¢ ¢	۵	? (№)
c (<i>(</i>	Synthetic Relations							
с	Dat Home ** Virt ** Virt Connec Environm SDK Versi	@ ∨	Rew Synthetic Relation R Destruction New Synthetic Relation Image: Comparison of the synthesis of the syn				×		
A Se C	Integra Solution 1 Dataverse User Role		Advanced Next		o other	Microsoft	services		

36. I clicked Next

 Dynamics 365 Business Cent	ral	Environment: Production	Ð	Q	Q	ŝ	?	NH
c (~	Synthetic Relations							
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Home	Relation Setup $P \sim$	2 ×			>	<		
s [≇] Virt	Internation Field Name							
¥ ^{sr} Virt	Primary Contact primary contactid							
Connec	→ Account Name iname							
	Website websiteurl							
Environm	Email emailaddress1							
SDK Versi	Main Phone telephone1							
	Fax fax							
	Credit Limit creditlimit							
Integra	Address 1: Primary Contact Name address1_primarycontactname			- /				
Calution	Address 1: Street 1 address1_line1		0	other Mi	rosoft ser	vices		
Solution	Address 1: Street 2 address1_line2							
A Dataverse	Address 1. City address 1 city							
– Sa User Role		OK Cancel				_		
(

37. I selected the CRM Account | Account Name field

Dynamics 365 Business Central			Production	Ð	م	Q	ŝ	? (N	H)
c < <	Synthetic Relations								
° Dat	②> / 『 ** Manage in Dataverse ** New 前し	amoua Cl Dofrach	3 7 ≣			×	2		
Home	Relation Setup $\sim \sim \sim$		ZX			×			
s [#] Virt									
≵[®] Virt	Virtual Table Column Name	Virtual Table Column Logical Name 1							
	billingPostalAddress	billingPostalAddress							
Connec	billToCustomerId	billToCustomerId							
	billToCustomerNumber	billToCustomerNumber							
Environm	billToName	billToName							
SDK Versi	contactId	contactId							
	currencyCode	currencyCode							
	currencyld	currencyld							
Integra	customerId	customerId			<u> </u>	-			
	→ <u>customerName</u>	customerName			other Mici	rosoft servi	icos		
Solution '	customerNumber	customerNumber							
A Dataverse	discountAmount	discountAmount							
 SaUser Role		ок	Cancel				_		
(Advanc									

39. I clicked Next

 Dynamics 365 Bu	siness Central			Environment: Production	Ð	Q	Q	\$?	NH
c (~	÷	Synthetic Relations								
C	Dat	Ø√ 🔎 🕅 -	New Synthetic Relation 27 ×	₽ 7 =				2 ×		
	≵[#] Virt		\checkmark							
	∦[#] Virt		A synthetic relation between the native table "CRM Account" and the virtual table "Sales Order" will be created.							
	Connec									
	Environm									
	SDK Versi				0					
	Integra						-			
	Solution 1				0 0	other Mici	rosoft se	rvices		
A	Dataverse									
Sa	User Role		Back Finish							
-	Advanc									

40. I clicked the Finish button

÷	→ G	≌≅ businesscentra	l.dynamic	s.com/fd6e8281-b9fe-436	d-9b85-db5f3dd4e	af8/Productio	n?company=	CRONUS%20)USA%2C%20Inc.&pa	ige=537	'6&dc=0&book	mark=8	36_AhU	4A (⊉ ☆	:
	Dynamics	365 Business Cent	tral								Environment: Production	Ø	Q	Ω	¢ې	NH
	с	~	\leftarrow	Synthetic Relations						Π	c 2					
	C	Dat		⁄0∨ ∕> ₪ /	Manage in Dataverse	e 💥 New	🗓 Remove	🕄 Refresh		Ċ	$\nabla \equiv$				2	
		Home		Name †		Synchronized ta	able		Virtual table					;	×	
		∦ [#] Virt		dyn365bc accosale9671	:	account			dyn365bc_salesorder_	_v2_0						
		📲 Virt														

41. I clicked Refresh to view the new Synthetic Relation

 Dynamics 365 Business Central		色 Prod	ronment: @D P D 🕸 ? NH
← ← Mi ←	Microsoft Entra Application Card	+ 🛍 ✓ Saved 🗗 🖌	7
E _	Power Pages Authenticated	d External Users	2
F C	Grant Consent More options		×
. (ż	General		
- 4	Client ID	er information	
C	Description · · · · · · Power Pages Authenticated Exte Us	er ID (5479c164-50c7-4191-baab-aa7	
En	State · · · · · · Enabled Vs	er Name POWER PAGES AUTHENTICATE	
sd 🔇	Contact Information · · · · Dynamics 365 Business Central Us	er Telemetry ID	
	Extension Yo	u must set the State field to Disabled before you can mak	
In	App ID		
_	App Name		a other Microsoft services
50			
Da	User Permission Sets 🛛 👫 New Line 🔅 Delete Line 🔄 Per	missions 🖻 🖸	
Us	Permission Set † Description Company † Exten	ision Name Permission Scope	
A	→ D365 FULL A : Dynamics 365 F Base	Application System	
Ov	LOGIN Login access System	em Application System	
0			

42. I updated the configuration of the **Power Pages Authentication External Users** Microsoft Entra Application

43. I selected the new Synthetic Relation

-88 - P	Power Pages			色 Environment 也 Develop	<i>ଣ</i> ି ଢ ଛ ? ା∺
ĥ		ని Customer Port	tal - Private - Saved 🗸	New table permission	×
Pages	Pages + Page	9 9 8		dyn365bc_accosale9671	~
Pages Styling Data Event Security	Main navigation	© Corr © Edit list © Set the per visitors.	Add filter V P Edit views V Add filter V P Edit views V Roles X Select roles that apply to the table permission.	dyn36bbc_accosale96/1 Related tables Image: Constraint of the second	r site visitors to use the data component. Create Append to
		an example of a single line of text	Administrators Anonymous Users Authenticated Users Authenticated Sers	Roles + Add roles	Save Cancel

44. I added the Authenticated Users Role

III Po	ower Pages		Environment B Develop		⁵	Q	٩	?	NH					
G			Se Customer	Portal - Private -	Saved 🗸			Table permissions						×
Pages	Pages + Page	5 C S						The table permissions listed here ar modify it or choose New table per	e for the co mission to	omponent you'r create a new o	e workin ne. Lean	ig on. Se n more	lect on	e to
Ç Styling	Main navigation		O Company name		Name	Status	Roles							
	☆ Home							Assount Color Orders	A shires	Austrantia				
Data	🗋 Sales Orders 👌 🛛 …							Account sales Orders	ACUVE	Authentica	tea User	5		
Set up Set up Security 	Other pages		No. This is an example of a single line of text This is an	st = Add fil Order Date mm/dd/yyyy	Iter V 6 Total Amount Including Tax 0.00	Edit view Customer Name This is an example of a single line of text This is an	Ship-to Addres Line 1 This is an examp of a single line of text This is an	田 Manage all table permissions						
			an example of a single line of			an example of a single line of	an examp of a single			New table p	ermissio	on	Close	e

45. I clicked the Close button

III Po	ower Pages		Develop	ୟ ⁵ ଢ଼ ା ୍ ା ା ା
ଜ		acceleration of the state of t	Ð	🗓 💭 🔿 Preview 🕞 Sync
Pages	Pages + Page	∀ <		🗙 Edit code 🛛 🍳 🗸 💋
Styling	Main navigation	Company name Z Edit site header		E
	☆ Home	Edit site header		
Data	🗋 Sales Orders 👌 🛛 …			
Set up	Other pages	Sales Orders		
Security	Page Not Found	Cales Orders		
		Total Amount Including No. Order Date Tax Customer Name	Ship-to Address Line 1	Status

46. I used the Edit site header button to update the site title

··· Power Pages				Environment Develop	¢ ^{\$} 🗘 🐵 ?	
â	င်္ခ္မွိ Customer Por	tal - Private - Saved $$		ζ	🐌 🗓 💭 🛛 🔿 Preview 🕻	o Sy
Pages Page	9 0 F				🗙 Edit code 🛛 🍭 🗸	27
Image: Solid point of the solid point o	Edit site header Title + logo Styling Layout	Site title Customer Porta Site logo Site logo	d image	× p-to Address Line 1 s is an example of ingle line of text	Status These are sample choices	
	Edit code example of a single line of text This is an mm/d example of a single line	Contoso Limited	This is an example of a single line of text This is an example of a single line of text	This is an example of a single line of text This is an example of a single line of text	These are sample choices	

47. I set the site title to Customer Portal

48. I updated the site Style

		Environment Develop	ୟ ⁵ ଢ଼ ⊗ ? (NH)
G		8°g Customer Portal - Private - Saved ∼	🧵 🛛 🔿 Preview 🛛 🔓 Sync
Pages F Styling	Security Monitor	Site visibility Control who can see and interact with your site. <u>Learn more</u>	
Data Deta Set up Security	Protect Same And Argenerations Page permissions Table permissions Same Argeneration firewall	This site is	
	Manage Identity providers Site visibility Advanced settings (preview)	Set to public Cancel Grant site access Add or remove people for site access. Enter name or email address Share	

49. I set the site visibility to Public

	,			
::: Power Apps Pow	ver Pages Management			
Check the site visibility be	efore editing. If the site is set to public, changes made here will be vis	sible immediately. Go to Power Pages to c	heck the visibility of this site.	Learn More
=	- 🖓 Show Chart 🥒 Edit 🚺 Activate 🗋 Deact	tivate 🗊 Delete 🖂 🔭 Merge	🖄 Create Invitation 🔒 Change Password 🖇	R, Assign 🗄 🖻 Share 🗸
Basic Forms				
Lists	All Contacts \vee		📆 Edit columns 🛛 🍸 Edit fil	ters 🔎 Filter by keyword
ි Shortcuts	Full Name ~	Email ~	Company Name ~ Business Phone ~	Status ~
Web Files				A
Multistep Forms	<u>Robert Lownes</u>	robert.townes@contoso.c	Adatum Corporation	Active
■ Web Link Sets	Helen Ray	helen.ray@contoso.com	Trey Research	Active
🖻 Web Pages	Meagan Bond	meagan.bond@contoso.c	School of Fine Art	Active
Web Templates	lan Deberry	ian.deberry@contoso.com	Alpine Ski House	Active
Security	Jesse Homer	jesse.homer@contoso.com	Relectoud	Active
A Contacts	Krystal York	krystal.york@contoso.com	Fabrikam, Inc. 4255550101	Active
Table Permissions	Evan McIntosh	evan.mcintosh@contoso	First Up Consultants	Active
Column Permissio	Bryce Jasso	bryce.jasso@contoso.com	Graphic Design Institute	Active

50. I navigated to the Robert Townes Contact record

	Power Apps	Power Pages Management $ ho$					NH
0	Check the site visibility	y before editing. If the site is set to public, changes made here will be visible immediately. Go to Power Pages to check the visibility of this site.				Learn N	Nore
		← 🗄 🖬 Save 🛱 Save & Close + New 🔓 Deactivate 🖏 Connect ∨ Å, Assign 🗊 Delete 🖄 Create Invitation			R	Share ·	,
	Basic Forms Lists	Create invitation RT Robert Townes - Saved Contact - C	on to a p	ortal. <mark>1</mark> 3	a745478) ~	
7 (Shortcuts Web Files	Summary Details Related ~					
	Multistep Forms						
— 哈	Web Link Sets	First Name P=kret					
D	Web Templates	Last Name * Townes					

51. I clicked the Create Invitation button

Security

53. I copied the Invitation Code

Web PagesWeb Templates

O Customer P	Portal	Home Q Sign in
→) Sign in Register R	tedeem invitation	
Redeeming code: rdttk0j-F bOkcPXc5An94bfZcoeEm	irSe3UeQfnHVO3nG-REIBdlg31nFDSu9uSraKZuWhuC- ıbcBnHHhrarRDxtDb7DZlJjBetSiEfyWMVIE61fc8qjkjWL	JJR6swbPYIL9Y26IZRYbv2F6J3B7hicum1KMz3PCq-f30dehPCu6Tw-
Register for a new local account		Register using an external account
* Email	robert.townes@contoso.com	Microsoft Entra ID
* Username	robert.townes@contoso.com	
* Password		
* Confirm password	······	
	Register	

54. I use the invitation code to register robert

55.

O Customer Portal	Hon	ne <u>Sales Orders</u> Q Robert Townes -						
Home / Profile		Sales Orders						
Profile								
Robert Townes	Please provide some information about yourself. The First Name and Last Name you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.							
Profile	Profile The Email Address and Phone number will not be displayed on the site.							
Security	posts.	i be displayed with your comments and forum						
Change password Change email	• Your email requires confirmation.	S Confirm Email						
Manage external authentication	Your information							
	First Name • Robert	Last Name • Townes						
https://haddieycustomerportal.powerappsportals.com/Sales-Orders/ I clicked the Sales Orders menu i	E-mail tem	Business Phone						

O Customer Portal

Home | Sales Orders | Q | Robert Townes -

Sales Orders

No.	Order Date	Total Amount Including Tax	Customer Name	Ship-to Address Line 1	Status
S-ORD101001	4/2/2023	17,773.66	Adatum Corporation	192 Market Square	Draft
S-ORD101002	5/1/2023	2,422.42	Adatum Corporation	192 Market Square	Draft
S-ORD101005	6/1/2022	150.00	Adatum Corporation	192 Market Square	Draft
S-ORD101006	6/1/2022	600.00	Adatum Corporation	192 Market Square	Draft
S-ORD101007	6/1/2022	450.00	Adatum Corporation	192 Market Square	Draft
S-ORD101008	6/1/2022	60.00	Adatum Corporation	192 Market Square	Draft
S-ORD101009	6/1/2022	2,400.00	Adatum Corporation	192 Market Square	Draft

56. I reviewed the Adatum Corporation Sales Orders

57. I created a child permission

III Po	ower Pages		ی Environment ک ⁵ Ω	
ଜ		🜐 Customer Portal - Public - Saved 🗸	New table permission	×
C Pages Styling Data Set up Secury	Security Monitor Run scan (preview) Protect % Web roles Page permissions Defermissions Compared of the providers Security providers Security Advanced settings (preview)	Customer Portal - Public - Saved ∨ Table permission Name Status Table Account Sales O Active Sales Order Account access 	New table permission Relationship * dyn365bc_salesorder_salesorderlines Image: Salesorder_salesorderlines Image: Salesorder_salesorder_salesorderlines Image: Salesorder_salesorder_salesorder_salesorderlines Image: Salesorder_salesorder	×
			Save	Cancel

58. I selected the Authenticated Users role

59. I created a Sales Order page

Ш Р					& ⁵
ଜ		🕀 Cu	stomer Portal - Public - Saved 🖂		🕼 🗓 💭 🛛 🔿 Preview 🔓 Sync
Pages	Pages + Page	9 Add a form		×	🗙 Edit code 🛛 🍳 🗸 🖉
Styling Data Set up Security	Main navigation	Form Data On submit CAPTCHA Attachments Al form fill	This form will collect information from your site visitors and store it in the table you choose. This form can be edited and reused. Choose a table * Sales Order Select a form * Portal Sales Order Main Form Name your copy of the selected form * Korology (Corology) Cancel Corology (Corology) Cancel Cor		

60. I added a text component and a form to the web site. I selected the **Portal Sales Order Main Form**

₩ P	ower Pages			Enviro Deve	nment clop
G		🕀 Customer	Portal - Public - Saved \sim		🕼 🔋 🖓 Treview 🗔 Sync
Pages	Pages + Page 9	Add a form		×	🗙 Edit code 🛛 🍳 🗸 🖉
rages Styling Data Data Security	Main navigation Home Sales Orders Main Sales Order Main Sales	Form Data On submit CAPTCHA Attachments Al form fill	Data from this form: Is read-only Configurations Advanced configurations are available in the Portal Management app C Open Power Pages Management ()	~	
			OK	icel	

61. The form will be read-only

62. On submit the user will be redirected back to the Sales Orders list page

63. I turned off the CAPTCHA

₩ P						<i>ଢ</i> ି ଦ 🐵 ? 🕅
ଜ			🕀 Cus	tomer Portal - Public - Saved 🗸		🕼 🗓 💭 🛛 🔿 Preview 🕞 Sync
Pages	Pages + Page	9	Add a form		×	K Edit code 🔍 🗸 🖉
Styling	Main navigation		Form	Enable form filling assistance (preview)		
	 Home		Data	Learn more about form fill assistance		
Data	🗋 Sales Orders 🔒		On submit	View preview terms		
			САРТСНА			
Set up	Other pages		Attachments			
Sacurity	Access Denied		AI form fill			
security	🍃 Page Not Found		· ·			
	🗋 Sales Order \cdots					
				l	OK Cancel	

64. I turned off AI form fill

III Po					¢ ⁵ ଢ଼ ବ ୍ ା∺
ଜ		G Customer Portal - Public - Saved 🗸		ą	🖞 🗓 💭 🛛 🔿 Preview 🔂 Sync
Pages	Pages + Page	N 0 00		-	🗙 Edit code 🛛 🔍 ∨ 🖉
Styling	Main navigation	List settings		×	
Data		Create a new record	۲		
Set up	Other pages	Download list contents			
Security	Access Denied	Row actions \odot			
	Sales Order	View details Target type	Webpage	Idress Line 1	Status
		Webpage ~	Sales Order \checkmark	n example of ine of text	These are sample choices
		Display label View			
			Done Cancel	n example of ine of text	These are sample choices
		single line		_	

65. I updated the List. I added a **View details** action that will navigate the user to the Sales Order page

		O Custo	omer Porta	I		Home	Sales Orders	Q Robert Townes	•
		Sales	Orders						
		No.	Order Date	Total Amount Including Tax	Customer Name	Ship-to Address Line 1	Status		
		S-ORD101001	View details	17,773.66	Adatum Corporation	192 Market Square	Draft	~	
		S-ORD101002	5/1/2023	2,422.42	Adatum Corporation	192 Market Square	Draft	~	
		S-ORD101005	6/1/2022	150.00	Adatum Corporation	192 Market Square	Draft	~	
		S-ORD101006	6/1/2022	600.00	Adatum Corporation	192 Market Square	Draft	~	
66.	I clicke	ed on th	e View de	tails link					
		O Custo	omer Porta	I.		Home	Sales Orders	Q Robert Townes	•
		•							
		Sales	Order						
		No.							
		S-ORD1010	01						
		Order Date 4/2/2023	1						
		Quantity	Unit Price	Invoiced Quantity	Amount Including Tax	Shipment Date I	Description	Unit Of Measure Code	
		Internal S	erver Error						

67. An Internal Server Error was generated

68. I added a New table permission

III Po	ower Pages		terrivinonment گ ♀ ♀ (National Action to the second seco
ଜ		\bigoplus Customer Portal - Public - Saved $ imes $	New table permission ×
Pages	Pages + Page	N (9 B)	Basic Child permissions
Styling	Main navigation	O Customer Portal	Name *
=	☆ Home		Global Sales Order Line
Data	🗋 Sales Orders 🗎 🛛 😳		Table *
Set up	Other pages		Sales Order Line
Security	& Access Denied	🔟 Edit list 🗟 Add filter 🗸 🕞 Edit views 🗸 🐣	Pc Access type * Global access
	Sales Order	Total Amount Including No. Order Date Tax Custome	Show all rows in the table to users in the selected roles. Learn more
		This is an mm/dd/yyyy 0.00 This is a of a sin of a sin of a sin of a single line of text	I Permission to g ✓ Read Update Create Delete Append Append to
		This is an mm/dd/yyyy 0.00 This is example of a sin of a sin of a single line of text	ar Roles g + Add roles Authenticated Users
		This is an mm/dd/yyyy 0.00 This is example of a sin	ar Save Cancel

69. I added a Global permission

O Customer Portal				Home Sales Orders	Q Robert Townes -
Sales Order					
No. S-ORD101001					
Order Date 4/2/2023					
Quantity Unit Price	Invoiced Quantity	Amount Including Tax	Shipment Date	Description	Unit Of Measure Code
12 1,397.30	0.00	17,773.66	4/2/2023	ATLANTA Whiteboard, base	PCS

2

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70. Logged in as Robert I was able to review Sales Order Lines associated with the selected Sales Order

III Po	ower Pages					Environment Develop	<i>ఢ</i> ీ ధ	\$? (NH)
ଜ		🕀 Cust	tomer Porta	I - Public - Saved 🚿	/		i 🔿 P	review	G Sync
Pages	Security	Table permissions							
F Styling	Monitor	+ New permission					\equiv Default \vee \wp Search		
Data	Protect	Name	Status	Table	Access Type	Roles	Relationship	Read	Update
Set up	Se Web roles	Account Sales O ···	Active	Sales Order	Account access	Authenticated Users	dyn365bc_accosale9671	\checkmark	
Security	Table permissions	$$ Sales Order \cdots	Active	Sales Order Line		Authenticated Users	dyn365bc_salesorder_salesor	. 🗸	
	Web application firewall	Global Sales Or	Active	Sales Order Line	Global access	Authenticated Users		\checkmark	
	Manage (c) Identity providers (c) Site visibility (c) Advanced settings (preview)								

71. I reviewed the Table permissions

	Power Apps	م	Search						Environment Develop	Ç			NH
=	Objects <	$+$ New \vee	$ ho$ Add existing $ \smallsetminus $	← In	$nport \lor \to Exp$	ort 🗸 🕖 Analyze	e 🗸 🗖 Publ	ish all customizations			♀ Search		
		Custome IE m	 ⇔ Agent 	> > >	:	Name → dyn365bc_saleso dyn365bc_saleso	Type ∨ Virtual Virtual	Managed ~ Yes Yes	Customized ~ No	Customizable \checkmark Yes Yes	Tags Standar	/ d	
5	²		 im Dashboard im Report im Security im Site im Table More 	>									

72. I added the Customer Portal Site to the solution

	Power Apps	و حر	Search					₽	Envir Dev	onment elop	l	Ĵ ;	₿ ?	NH
=	Objects <	$+$ New \vee $^{+}$	🕆 Add existing 🗸 🖉 Edi	it Ĵ∄ A	Advanced \vee 📋	Remove \vee						∕⊃ Sea	rch	
\leftarrow	✓ Search													
	i All (135)	Customer	Portal > Site											
	ф Agents (0)	o ie	Display name \uparrow $ \smallsetminus $		Name \vee	Туре	Managed \smallsetminus	Customized	\sim	Last Modif \vee	Owner	~	Status	
1:=	H Apps (1)	0	Customer Portal - bad	:	Customer Portal	Site	No	Voc		1 hour ago	Neil Hado	lav	Off	
5	Cards (0)		customerrortar nau		customer rortar	Site	110	10.5		r nour ago	Henridde	icy.		
0	⊿ ^a Cloud flows (0)													
,59°	🗀 Site (1)													
	🗀 Site Component (129)													
	🗈 Site Language (1)													
	Site maps (1)													
	> III Tables (2)													

73. The Customer Portal solution is ready to be exported

Customer Order Lines

Customer Order Lines refer to the individual items or services listed within a customer's order. Each order line represents a specific product or service being purchased, including details such as:

Product or Service Name: The name or description of the item.

Quantity: The number of units being ordered for that specific product or service. Price: The cost per unit of the product or service.

Total Amount: The extended price, which is typically the product of quantity and unit

prio	ce.										
	Power Apps	✓ Search						Environment Develop	¢		? (NH)
=	Objects <	$+$ New \vee 🖻 Ad	d existing \lor \leftarrow Import \lor I	→ Expc	ort 🗸 🕖 Analyze	∨ 🗖 Publish	all customizations		ş	O Search	
~ 		⊕ Agent ⊞ App	> > `ables								
	i Ξ All (139)	🖧 Automation	>		Name \vee	Type \vee	Managed \vee	Customized \vee	Customizable \vee	Tags \vee	
≣ ©	Apps (2) Cards (0)	வி Dashboard	>	:	account	Standard	Yes	No	Yes	Core	
<i>\$</i> 9	 Cloud flows (0) Site (1) Cloud flows (0) 	Security	> .	:	dyn365bc_saleso	Virtual	Yes	No	Yes	Standard	
	Site Component (129) Site Language (1) Site mans (2)	I Table	> Tables > Table (advanced pro	perties)	dyn365bc_saleso	Virtual	Yes	No	Yes	Standard	
	✓ Ⅲ Tables (4) Account Customer Order Sales Order		H Virtual table								
	> Sales Order Line										

I created a new Table in the Solution

:::	Power Apps	O Search New table	×
	Ohierte	Use tables to hold and organize your data. Previously called entities	
_	Objects	→ New ◇ ← Add existing ◇ ← Import ◇ ↦ Export ◇ ② Analyze	
4	✓ Search	Customer Portal > Tables Primary column	
	i All (139)	Display name *	
	⇔ Agents (0)	IΞ Table ↑ ✓ Name ✓ Customer Order Line	
'≡	P Apps (2)	Account account Plural name *	
9	Cards (0) √ ^a Cloud flows (0)	Customer Order Lines	
5	Site (1)	Sales Order	
	🗈 Site Component (129)		
	🖹 Site Language (1)	III Sales Order Line : dyndobbc_saleso	
	Site maps (2)	Enable attachments (including notes and files) ¹	
	Tables (4)	Advanced options A	
	Customer Order	Schema name *	
	> Sales Order	hadd_ CustomerOrderLine	
	> Sales Order Line	Туре*	
		Standard V	
		Record ownership *	
		licer or team V	
		Save Cancel	
In	\mathbf{r}	ustomer Order Lines	
Ina	amed the table C	ustomer Order Lines	
l na	Power Apps	Search Edit column Deviation and field fails and and	×
l na	Power Apps Objects <	✓ Search Edit column + New column B Add existing column ✓ Edit Image: Add existing column ✓ Edit Image: Advanced ✓ Image: Previously called fields. Learn more	×
l na ::: = ←	Power Apps Objects	Ustomer Order Lines ✓ Search + New column ↔ Add existing column ✓ Edit ☆ Advanced ✓ ☆ Re Previously called fields. Learn more Display name *	×
l na ∷: ∉	Power Apps Objects Search E all (140)	Search Edit column + New column Add existing column Edit II Advanced V III R Customer Portal > Tables > Customer Order Line > Columns Name	×
l na 	Power Apps Objects Posearch All (140) Agents (0)	Ustomer Order Lines Search Edit column New column	×
I na 	Power Apps Objects < Posearch E All (140) Agents (0) P Apps (2)		×
na == 	Power Apps Objects < Search E All (140) Agents (0) Apps (2) Cards (0)	Lines	×
	Power Apps Objects < Search If All (140) \$\phi Agents (0) If Apps (2) Cards (0) \$\notherwide Coud flows (0)	Lines	×
	Power Apps Objects < Search If All (140) Agents (0) Apps (2) Cards (0) Cards (0)	Search New column Add existing column Edit Advanced < Customer Portal > Tables > Customer Order Line > Column Display name ↑ Name Data type Created By Created On Created O	×
	Power Apps Objects < Search If All (140) Agents (0) Apps (2) Cards (0) a rd Cloud flows (0) Site (1) Site Component (129) Circle Language (1)	Search New column Add existing column Edit Customer Portal Tables Customer Order Line Created On Created Customer. Unique identifie 	×
	Power Apps Objects	Search	×
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I updated the Customer Order Lines | Name field

	Power Apps			,∕O Search				Display name *
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53	🗀 Site (1)			Created On		CreatedOn	🗟 Date and time	Business required ~
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	 Customer Order Line 			Modified On		ModifiedOn	🗟 Date and time	Schema name * 🛈
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	™ ^a Relationships			0		Quanda	0.0	Relationship name *
	🖓 Keys		Owner		Ownerid	× Owner	hadd_ customerorderline_Order_hadd_cust	
	E Forms			Owning Business Unit		OwningBusiness	P Lookup	
	Views			Owning Team		OwningTeam	P Lookup	Save Cancel
	Charts					2	,p	

I added an Order Lookup field. The **Order Lookup** column created a relationship between the **Customer Order** and the **Customer Order Line** tables

Bus	iness Central Configuration				? (NH
□ Home ① Recent ∨ ☆ Pinned ∨ Business Central	← □ Image: Save & Close + New Image: Delete Check Access Image: Save & Close Save & Close Save & Close Save & Close Save & Close Save & Close Save & Close item - Unsaved Save and close this Available Business Central Table. Save and close this Available Business Central Table. Save and close this Available Business Central Table. General Related ~	~	:	(B)	hare v
🛱 Available Tables					
😚 Table Relations	Name * 🗅 item				
않 Configurations 公 Default Companies	Display Name 🗅 Item				
	API Route * C v2.0				
	Visible 🗹				
	Refresh				

I added the Business Central Item Virtual Table

	Power Apps	∠ Search				Display name *
=	Objects <	+ New column 댐 Add existing c	olumr	i ∦ Advanced ∨		Item
\leftarrow		Customer Devtel \ Tables \	Curr	tomar Ordar Li		Description ①
	≣ All (140)	Customer Portal / Tables /	Cus	stomer Order Li	ne / Columns	
2	Ġ Agents (0)	Display name \uparrow \checkmark		Name \vee	Data type \vee	Data type * ①
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0	o ⁿ Cloud flows (0)	Created By (Delegate)		CreatedOnBehalf	, P Lookup	Required O
59	🗀 Site (1)	Created On		CreatedOn	🗟 Date and time	Business required \checkmark
	 Site Component (129) Site Language (1) 	Customer Order Line		hadd_Customer	🖽 Unique identifie	Searchable O
	Site maps (2)	Import Sequence Nu		ImportSequence	💷 Whole number	Related table *
	> III Tables (5)	Modified By		ModifiedBy	Р Lookup	Item 🗸
		Modified By (Delegate) ModifiedOnBeha			,∕P Lookup	Advanced options A
		Modified On		ModifiedOn	🗟 Date and time	Schema name * 🛈
		Name Primary name column		hadd_Name	# Autonumber	nadaitem
		Order		hadd_Order	₽ Lookup	Relationship name * hadd_ customerorderline_Item_dyn365bc_i
		Owner		Ownerld	A Owner	
		Owning Business Unit		OwningBusiness	₽ Lookup	Save

I added an Item lookup column to the Customer Order Lines table

	Power Apps	✓ Search				
=	Objects <	+ New column 답 Add existing c	əlumn	\mathbb{H} Advanced $^{\sim}$		Display name * Quantity
<i>←</i>	Search I≡ All (141)	Customer Portal > Tables >	Cus	tomer Order Li	ne > Columns	Description ©
2	ф Agents (0)	Display name \uparrow \checkmark		Name \vee	Data type \vee	
11	 Apps (2) Cards (0) 	Created By		CreatedBy	,∽ Lookup	Data type * ①
0	$\sim^{/\alpha}$ Cloud flows (0)	Created By (Delegate)		CreatedOnBehalf	, P Lookup	winder v
<i>5</i> 97	Site (1)	Created On		CreatedOn	昂 Date and time	None V
	Site Language (1)	Customer Order Line		hadd_Customer	🖽 Unique identifie	Behavior O
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	> 🏢 Tables (6)	ltem		hadd_ltem	, [©] Lookup	Required O
		Modified By		ModifiedBy	,∕⊃ Lookup	Business required \lor
		Modified By (Delegate)		ModifiedOnBeha	,∕P Lookup	Searchable O
		Modified On		ModifiedOn	🗟 Date and time	Advanced options
		Name Primary name column		hadd_Name	# Autonumber	Schema name * O
		Order		hadd_Order	, P Lookup	quartery
		Owner		Ownerld	옷 Owner	Save Cancel

I added a Whole Number Quantity column

I created a view

I added the Item and Quantity columns to the Portal view

III Power Apps | Form

I added a form to the Customer Order Line table

🔶 Back 🦻 🦿 🦿 🐒 🖄 🖉 V 🎘 Hide 🔤 Form field 🗄 Component 🖪 Form libraries 🗞 Business rules 🚦 Form properties 🗟 Form settings … 🗟 Save a copy 🔿 Saving and publishing 🗸

Develop

=	Table columns $\qquad imes$			Saving and publishing the document Quantity
ß		New Customer Order Line Neil Haddley Customer Order Line Owner Name	~	Whole number
				Properties Events Business rules
Abc	+ New table column	General Related V		 Display options
	Show only unused table columns			Table ashire
8		ltem *		Quantity ①
25				🖉 Edit table column
	🗟 Created On	Quantity *		Label *
\$-a	℅ Modified By			Quantity
	℅ Modified By (Delegate)			
	🗟 Modified On			
	₽ Order			Hide on phone
	Owning Business Unit			Hide 🛈
	Status			Lock (i)
	⊡ Status Reason			Read-only

I added the Item and Quantity columns to the form

I added a Customer Order Lines Grid to the Customer Order table's Portal form

	Power Apps Form	盘 Develop	
\leftarrow e	Back 7 C X 🗈 🗸	1 Delete 📾 Form field 🖽 Component 🕼 Form libraries 🗞 Business rules 🗄 Form properties 🕞 Form settings ··· 🕞	$>$ Save a copy \checkmark Saved and published \checkmark
=	Components	× New Customer Order Neil Haddley ×	New SG control 1734683747 >
₿	✓ Search	Customer Order Name Owner	Properties
Abc	✓ Popular	General Related V	 Display options
٢	1 -column tab	Requested Delivery	Label * New SG control 1734683747072
5	1-column section	+ New Customer Order :	Name *
	□ Quick view Ⅲ Subgrid	Name	Hide label
	Timeline	No data available	Hide on phone
	> Layout ~ Grid		Table
	Editable Grid	0-0of0 Id ← Page1 →	Default view
	 > Display 		Portal Active Customer Or \checkmark
	> Input > Media		Allow users to change view
	Get more components	☐ Responsive (819 x 595) ∨ Show hidden Off + 100 % +	Hide search box

I uncheck the Hide lat	oel checkbox
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I tested the add Customer Order Line form

	Power Apps	Custo	mer Or	rders																			۶	C	+	7	ŵ	?	NH
≡ ଜ	Home		¢	-	С	层 Sav	/e (🛱 S	ave & Cl	ose	+ N	ew	🗟 Deact	vate	🗓 De	lete	🖔 Refres	h	🔍 Check Access	8, /	Assign	Ø	Flow	~	:		ľ	\$ Shar	re v
し ジ Nev	Recent Pinned v Group	~	Or Cur Ge	Order-1 ustomer (0000 Order · Relat	1 - Saved Portal 0 ed ∽	d Custor	mer (Order M	ain Fo	orm ~									Orde Name	er-1000 e	001	РР	# Pc Own	ortals- er	Custon	ner Porta		~
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					Line-10	00000							ANTW	ERP C	onference	e Tabl	le				1 1	2/20/	2024 8	:38 AI	М				
				Rows: 1																									

I was able to add a line to an order

E P				\$° Q ⊗ ? (NH)
G		\bigoplus Customer Portal - Public - Saved \vee		🕼 🔋 🖓 🔿 Preview 🕞 Sync
Pages	Pages + Page 9	~ 8		K Edit code 🛛 🍳 🗸 🖉
Styling	Main navigation	Add a page	×	
Europ Data Set up Security	 A Home Sales Orders A Customer Orders A Other pages A Access Denied Edit Customer Order A New Customer Order A Page Not Found Sales Order 	Page name * This name will appear as part of the page URL, but will not be visible in the site navigation. Standard layouts Custom layout Back Back	Cancel	

I created a New Customer Order Line page

I added a New Customer Order Line Basic form

₩ P					డీ ధ భ	
G		🕀 Custo	omer Portal - Public - Saved 🖂		🍎 🗓 🗔 🔿 Previ	ew 🕞 Sync
Pages	Pages + Page	ッ Add a form		× z	🤹 Copilot	×
Pages Styling Data Data Set up Security	Main navigation Home Sales Orders A Customer Orders A Other pages % Access Denied Edit Customer Order A New Customer Order A New Customer Order A New Customer Order A New Customer Order Ine	Form Data On submit CAPTCHA Attachments Al form fill	Data from this form: Creates a new record Configurations Advanced configurations are available in the Portal Management op Open Power Pages Management ()		Copilot Hi Neil, what can I help you with Page design Create page, section, and Data forms Work with your business Work with your business	1? themes data
	Sales Order		Form To configure this form, choose edit from the toolbar		Choose a starter prompt, reque or ask a question	est an action,

I selected the Creates a new record option

I selected redirect to the Edit Customer Order page

	Power Pages			A Develop	¢´ Q &	
G		🕀 Custo	omer Portal - Public - Saved $$		💋 🗓 💭 🛛 🔿 Preview	G Sync
Pages	Pages + Page	Add a form		× ?	🧐 Copilot	×
Styling	Main navigation	Form	Show CAPTCHA for anonymous users	_	- (
Ē	☆ Home	Data	Show CAPTCHA for authenticated users			
Data	🗋 Sales Orders 🔒	On submit			Copilot	
Set up	🗋 Customer Orders 🔒	САРТСНА			Hi Neil, what can I help you with?	
Security	Other pages	Attachments AI form fill			Page design Create page, section, and theme	25
	8 Access Denied				Data forms	5
	🗋 Edit Customer Order 🔒				Work with your business data	
	🗋 New Customer Order 🔒				(D) A-1	5
	🗋 New Customer Order Line 🛛 …				Get answers to your questions	
	Page Not Found			OK Cancel		
	Sales Order				Choose a starter prompt, request an a or ask a question	action,
			Form		\$₀	⊳

					ఢ్ ధ 🐵	
2		⊕ Cus	tomer Portal - Public - Saved 🗸		💋 🔋 🖵 🛛 🔿 Preview	🔓 Syn
) s	Pages + Page	Add a form		×	🧐 Copilot	×
l N	Aain navigation	Form	Enable form filling assistance (preview)			
3	က် Home	Data	Learn more about form fill assistance		Constant.	
	🗋 Sales Orders 🔒	On submit	View preview terms		Copilot	
	🗋 Customer Orders 🔒	САРТСНА			Hi Neil, what can I help you with?	
p lew		Attachments			🔲 Page design	
ty C)ther pages	AI form fill			Create page, section, and them	nes
	₽ _∞ Access Denied				Data forms	
	🗋 Edit Customer Order 🔒				Work with your business data	
	🗋 New Customer Order 🔒				(1) Ack	
	New Customer Order Line				Get answers to your questions	
	Page Not Found		ок	Cancel		
	Sales Order				Choose a starter prompt, request an or ask a question	action,
			Form To configure this form, choose edit from the toolbar		\$.	\triangleright

I deselected the AI form filling experience

E P	ower Pages		الله کې کې کې کې 🕸 کې 🕸 🖉
â		\bigoplus Customer Portal - Public - Saved $ \smallsetminus $	Table permissions
Pages	Pages + Page	୬ ୧୯ ୫୦	Customer Order Line table: The Create privilege must be selected to allow your site visitors to use the data component.
Styling	Main navigation	O Customer Portal	Name Status Roles
Data Deta Set up Security	 in Home in Sales Orders in Customer Orders in Customer Orders in Customer Order in New Customer Order in New Customer Order in New Customer Order in New Customer Order Line in New Customer Order in Sales Order 	82 Edit form 60 Edit fields 20 Pe ① Set the permission on this form so it can be visitors. Item * Quantity *	Name Status Roles
		Submit +	+ New permission

I reviewed the table permissions

III Po	wer Pages					Environment B Develop	¢`		? (NH)
Q		¢	Customer Porta	I - Public - Saved 🚿	Ý		i @ P	review	🕞 Sync
Pages	Security	Table permissions							
F Styling	Monitor	+ New permission					\equiv Default \vee \bigcirc Search		
Data	Protect	Name	Status	Table	Access Type	Roles	Relationship	Read	Update
Set up	පී Web roles	Account Custo	··· Active	Customer Order	Account access	Authenticated Users	hadd_customerorder_Accou		
Security	Page permissions	Account Sales O	✓ Edit ↓ Add child per	mission	Account access	Authenticated Users	dyn365bc_accosale9671	\checkmark	
- secondy	A Web application firmual		~						

I clicked the Add child permission menu item

III Po	ower Pages				B Environment
ଜ		Custom	ner Portal - Public - Saved	~	New table permission $ imes$
Pages	Security	Table permissions			Basic Child permissions
Styling	Monitor	+ New permission			Show rows of the selected table within 'Customer Order' table Learn more
Data	Protect	Name	Status Table	Access Type	Parent permission Table Account Customer Orders Customer Order
C Set up	Se Web roles	Account Custo	Active Customer Order	Account access	Name *
Security	Table permissions	Account Sales O	Active Sales Order	Account access	Customer Order Lines by Customer Order
	Web application firewall	⊂→ Sales Order	Active Sales Order Line		Customer Order Line
	Manage	Global Sales Or ···	Active Sales Order Line	Global access	Relationship *
	 Site visibility Advanced settings (preview) 				Related tables
					hadd_customerorderline_Order_hadd_customerorder
					Save

I named the child permissions entry Customer Order Lines by Customer Order.

The **Customer Order Lines by Customer Order** permission entry allows the logged in user to view any Customer Order Line that is related to a Customer Order they have access to.

III P	ower Pages				A Develop & D 🕸 ? (NH
â		Customer	Portal - Public - Saved 🗸		Customer Order Lines by Customer Order $\qquad \qquad \qquad$
Pages	Security	Table permissions			Relationship *
Styling Data	Monitor Run scan (preview) Protect	+ New permission	atus Table	Access Type	Related tables
Set up	င်္ခို Web roles	Account Custo ··· Act	tive Customer Order	Account access	hadd customerorderline Order hadd customerorder
Security	Table permissions	⊂→ Customer O ··· Act	tive Customer Order Line		Customer Order
	Web application firewall	Account Sales O ··· Act	tive Sales Order	Account access	
	Manage Identity providers	⊂→ Sales Order ··· Act	tive Sales Order Line		Permission to
	Site visibility	Global Item ···· Act	tive Item	Global access	✓ Read ✓ Update ✓ Create ✓ Delete ✓ Append Append to
	-g Advanced settings (pronew)	Global Sales Or ··· Act	tive Sales Order Line	Global access	Roles
					+ Add roles Authenticated Users Save Cancel

Account Customer Orders permissions provides the given users to only the rows/records that relate to their organization.

Notice that the Append permission has been added

ഹ		Customer Portal - Public - Saved > Account Customer Orders	×
Pages	Security	Table permissions hadd_customerorder_Account_account	~
Styling	Monitor	+ New permission Related tables	
Data	Protect	Name Status Table Access Type	
Set up	Se Web roles	Account Custo ··· Active Customer Order Account access	
Security	Table permissions	T→ Customer O ··· Active Customer Order Line P Account	
	Web application firewall	Account Sales O ··· Active Sales Order Account access	
	Manage Identity providers	T Sales Order ··· Active Sales Order Line Permission to	
	Gite visibility	Global Item ···· Active Item Global access C Delete Append C Append to	
	👒 Advanced settings (preview)	Global Sales Or ··· Active Sales Order Line Global access	
		+ Add roles	
		Authenticated Users	
		Save Cancel	

I added **Read**, **Update**, **Create**, **Delete** and **Append to** permissions to the Account Customer Orders Table permissions entry.

We would like a user to be able to create Customer Order Lines to existing Customer Orders

Power Apps Pow	er Pages Management $ ho + abla $ $ ho + abla $ $ ho$ $ ho$ $ ho$
• Check the site visibility be	fore editing. If the site is set to public, changes made here will be visible immediately. Go to Power Pages to check the visibility of this site.
Ⅲ 命 Home	← □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □
 Becent ∨ S² Pinned ∨ 	Edit Customer Order - Saved Basic Form
Website	General Form Options On Success Settings Additional Settings Associated Table Reference Basic Form Metadata Related \vee
Websites	Associated Table Reference
Page Templates	+ New Basic Form Meta 🖒 Refresh 🗄
」→ Redirects	Rasir Form ↑ ✓ Type ↑ ✓ Attribute Logica × Section Name × Tab Name × Submid Name × Control Style × Group ×
Gite Markers	
Do Site Settings	
愆 Settings	
Content	We didn't find anything to show here
Content Snippets	
Basic Forms	Rows: 0
🗏 Lists	

The Edit Customer Order form displays a Grid of related Customer Order Line records

	Power Apps Pov	wer Pages Management	م	+	7	ŝ	? (NH
0	Check the site visibility b	efore editing. If the site is set to public, changes made here will be visible immediately. Go to Power Pages to check the visibility of this site.					Learn Mo	ore
≡ ଜ	Home	← 🗄 🖬 Save 🛱 Save & Close + New 🚺 Deactivate 🗊 Delete 🖒 Refresh 🔍 Check Access 🔊 Flow ∨	:			1	Share \vee	
© \$?	Recent \checkmark Pinned \checkmark	Edit Customer Order - Saved Basic Form						
Wel	osite	General Form Options On Success Settings Additional Settings Associated Table Reference Basic Form Metadata Re	lated \checkmark					
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♪	Redirects	Basic Form 1 × Tune 1 × Attribute Logica × Section Name × Tab Name × Suborid Name ×	Add Net	v Basic F	orm Meta	idata		
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00	Site Settings							
\$	Settings							
Con	tent	We didn't find anything to show here						
ੈ	Content Snippets							
B	Basic Forms	Rows: 0						
Ξ	Lists							

I added a Basic Form Metadata entry

Power Apps Power Pages Management							NH		
Check the site visibility before editing. If the site is set to public, changes made here will be visible immediately. Go to Power Pages to check the visibility of this site.									
Home Save a Save a Close + New ∞ Flow ∨									
© Recent ∨ ☆ Pinned ∨ New Basic F	Recent V Pinned V New Basic Form Metadata - Unsaved								
Website General									
Websites	subgrid V								
Page Templates							5		
	* 🗅 Subgrid_new_1						~		
Gite Markers	g						- 1		
Site Settings									
Settings Grid Configuration		0	Advance	ed setting	js 📿 Re	efresh Vie	ew		
Content View Actions	+ Create + Download + Associate								
Create						×			
Basic Forms Target Type	Webpage					ž			
E Lists Redirect to We	bpage New Customer Order Line (Customer Portal - haddleycustomerportal)					ž			
금* Shortcuts Button Label	English (United States) (1033) Create								
🕀 Web Files									
Multistep Forms Item Actions + Details + Edit + Delete + Workflow + Greate Related Record + Disassociate + Activate + Deactivate									

This Basic Form Metadata entry configures the Grid displayed on the Edit Customer Order form

O Customer Portal

Home | Sales Orders | Customer Orders | Q | Robert Townes -

Edit Customer Order

		Crea	te
Item	Quantity	Created On	
ANTWERP Conference Table	1	12/20/2024 7:38 PM	
	Item ANTWERP Conference Table	Item Quantity ANTWERP Conference Table 1	Item Quantity Created On ANTWERP Conference Table 1 12/20/2024 7:38 PM

A Create button has been added to the Customer Order form's grid

Lookup records	
Search Q	
New Custom Choose one record and click Select to continue	
Item *	
Quantity *	
Submit	
You don't have permissions to view these records.	
Copyright © 2024. All rights	

I was not able to lookup Items

ົດ		🕀 Custo	mer Portal	- Public - Saved $$		New table permission $\qquad \qquad \qquad$
Pages	Security	Table permissions				Basic Child permissions
Styling	Monitor	+ New permission				Name *
Data	Protect	Name	Status	Table	Access Type	Global Item
Set up	온을 Web roles	Account Custo	Active	Customer Order	Account access	Item ρ
Security	Page permissions Table permissions	⊂ Customer O ···	Active	Customer Order Line		Access type *
	Web application firewall	Account Sales O	Active	Sales Order	Account access	Global access Show all rows in the table to users in the selected roles. Learn more
	Identity providers	⊂→ Sales Order ···	Active	Sales Order Line		Permission to
	Gite visibilityAdvanced settings (preview)	Global Sales Or ···	Active	Sales Order Line	Global access	Read Update Create Delete Append Append Append to
						Roles Add roles Authenticated Users
						Authenticated Users Save Cancel

I added a Global table permission. The Global table permission provides access to all rows/records in given table

0	Check the site visibility bef	ore editing. If the site is set to pub	lic, changes made here will be visible imm	nediately. Go to Power Pa	ages to check the visibility of thi	s site.	Learn More
≡ ଜ	Home	← 🗄 🖬 🖬 Save	🛱 Save & Close 🕂 New 🗋 D	eactivate 📋 Delete	🖔 Refresh 🛛 🔍 Check Acc	tess ∑ Flow ∨ 🗄	🖄 Share 🗸
© ☆	Recent \checkmark Pinned \checkmark	New Customer Orde Basic Form	er Line - Unsaved				
We	bsite	General Form Options	On Success Settings Additional	Settings Associate	d Table Reference Basic	Form Metadata Related	~
\oplus	Websites						
D	Page Templates	Redirect					
ŗ	Redirects	External URL					
5	Site Settings	or Web Page	Edit Customer Order ×	٩			
3	Settings	Append Existing Query String					
Cor	itent	Append Record ID To Query			Record ID Parameter Name		
ੈ	Content Snippets	String					
B	Basic Forms	Append Custom Query					
≡	Lists	String					
đ	Shortcuts	Append Attribute Value to Query String - Parameter	id		Append Attribute Value to Query String - Attribute	hadd_order	
6	Web Files	Name			Logical Name		
	Multistep Forms						

I updated the On Success Settings to ensure that the Customer Order's id would be passed

O Customer Por		×	a Q Robert Townes →
	Lookup records		
		Search Q	
New Custom	Choose one record and click Select to continue		
Item *	ATHENS Desk		
	PARIS Guest Chair, black		Q
Quantity *	ATHENS Mobile Pedestal		
	LONDON Swivel Chair, blue		
	ANTWERP Conference Table		
Cubusti	Conference Bundle 1–6		
Submit	< 1 2 3 4 5 6 >		
		Select Cancel Remove value	
I selected a Customer	Order Lines Item		
O Customer Port	al	Home Sales Orders Customer Orders	s Q Robert Townes -

New Customer Order Line

Item *	
LONDON Swivel Chair, blue	× Q
Quantity *	
4	
Submit	

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I entered a Quantity and clicked the Submit button

O Customer Portal	Home	Sales Orders	Customer Orders	Q	Robert Townes -

Edit Customer Order

Requested Delivery Date *			
1/2/2025			#
			Create
Name 1	Item	Quantity	Created On
Line-100000	ANTWERP Conference Table	1	12/20/2024 7:38 PM
Line-100001	LONDON Swivel Chair, blue	4	12/20/2024 8:04 PM

I was redirected back to the Edit Customer Order page

I added an Edit Customer Order Line page

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I added a form

I named the new form Edit Customer Order Line

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Critical Control of Co	Pages Page Main navigation	Customer Customer Customer Customer Form Data On submit CAPTCHA Attachments Al form fill	Portal - Public - Saved ∨ Data from this form: Updates an existing record Configurations Advanced configurations are available in the Port □' Open Power Pages Management	CK Cancel	Copilot Copilot Copilot Copilot Copilot Hi Neil, what can I help you with? Page design Create page, section, and themest Work with your business data Work with your business data Ask Get answers to your questions. Choose a starter prompt, request an a or ask a question Image: A section and the page of the	s Sync ×
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The new form would allow a user to update a Customer Order Line

The Edit Customer Order page will redirect to the Edit Customer Order page

Show CAPTCHA for anonymous user	s errs	Copilot Copilot Hi Neil, what can I help you with?
Show CAPTCHA for anonymous user	s ers	Copilot Hi Neil, what can I help you with?
Show CAPTCHA for anonymous user:	s ers	Copilot Hi Neil, what can I help you with?
Show CAPTCHA for authenticated us	ers	Hi Neil, what can I help you with?
		Page design Create page, section, and themes
ts		I Data forms
		Work with your business data
		Get answers to your questions
		Choose a starter prompt, request an action,
	OK Cancel	or ask a question
	5	S OK Cancel

I disabled AI form filling

	Power Apps	ower	Pages Management					م	+	7	ŝ	?	NH
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Ð	Multistep Forms												

I updated the On Success Setting of the Edit Customer Order Line form

Check the site visibility b	efore editing. If the site is set to public, cha	nges made here will be visible immediately. Go to Power Pages to check the visibility of this site.	Learn More
=	← ⊑	v Close $+$ New. \square Deactivate \square Delete () Refresh \Im Check Access $\%$ Flow \vee :	R Share ~
☆ Home			
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Site Settings	Edit 💌		† ×
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	Redirect to Webpage	Edit Customer Order Line (Customer Portal - haddleycustomerportal)	Ÿ
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G* Shortcuts	and a second second	Delete	
🕒 Web Files			12
Hultistep Forms	Override Column Attributes		

I added an Edit and a Delete menu item

eycustomerportal.powerappsportals.com/Edit	-Customer-Order/?id=14b67e1a-61	ba-ef11-95f5-6045bd00d1a0			☆	۹
Customer Order						
ed Delivery Date *						
5						
				Create		
	Item	Quantity	Created On			
0000	ANTWERP Conference Table	1	12/20/2024 7:38 PM	Edit Delete Edit		
0001	LONDON Swivel Chair, blue	4	12/20/2024 8:04 PM			
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I used the Edit button to update a Customer Order Line Neme Sales Orders Customer Order Line Image: Customer Orde

I updated the Quantity

Edit Customer Order

1/2/2025				i
				Create
Name 1	Item	Quantity	Created On	
Line-100000	ANTWERP Conference Table	1	12/20/2024 7:38 PM	~
Line-100001	LONDON Swivel Chair, blue	6	12/20/2024 8:04 PM	~
ibmit				

I was redirected to the Customer Order with the updated line displayed

O Customer P	ortal	Home S	ales Orders Customer Orders Q R	lobert Townes -
Customer C	Orders			
				Create
Name 1	Account	Requested Delivery Date	Created On	
Order-100001	Adatum Corporation	1/2/2025	12/15/2024 8:19 AM	~
Order-100002	Adatum Corporation	12/17/2024	12/20/2024 5:06 PM	~

Clicking Submit in the Customer Order's page redirects the user back to the Customer Orders list page

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=	Name $\uparrow \lor$	$\ $ Item \vee	Unit Price \vee	Base \vee	Quantity \vee	Create	d On \sim + View column			Portal Acti	ve Cus	tomer O	rde	. >
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	Line-100001	LONDON Swivel	190.10	PCS	6	12/20/2	Customer Order Line Related			Name *				_
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I added the related Item | Unit Price and Item | Based Unit of Measure columns to the Portal Active Customer Order Lines view

O Customer Portal	Home Sales Orders Customer Orders Q Robert Townes -

Edit Customer Order

12/17/2024						
						Create
Name 1	Item	Unit Price (Item)	Base Unit Of Measure Code (Item)	Quantity	Created On	
Line-100006	PARIS Guest Chair, black	192.80	PCS	2	12/20/2024 10:35 PM	~
ubmit						