



Installation Guide for Wiise Customer Portals

Wiise Customer Portal uses both Microsoft Business Central/Wiise and Power Pages 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

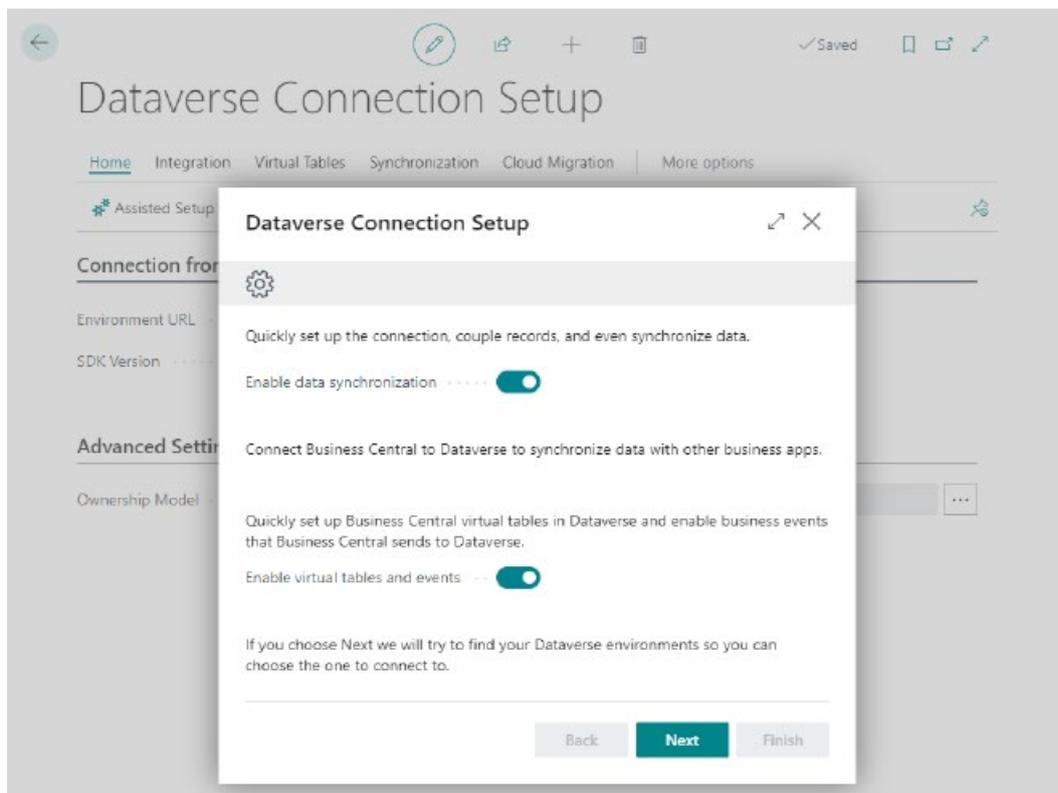
Download the Customer Portal files from the Wiise GitHub repository located [here](https://github.com/Administrator-Wiise/wiise-customer-portals) get <https://github.com/Administrator-Wiise/wiise-customer-portals>. Make sure the following two files are downloaded:

Wiisecustomer portal_X_X_X_X.zip

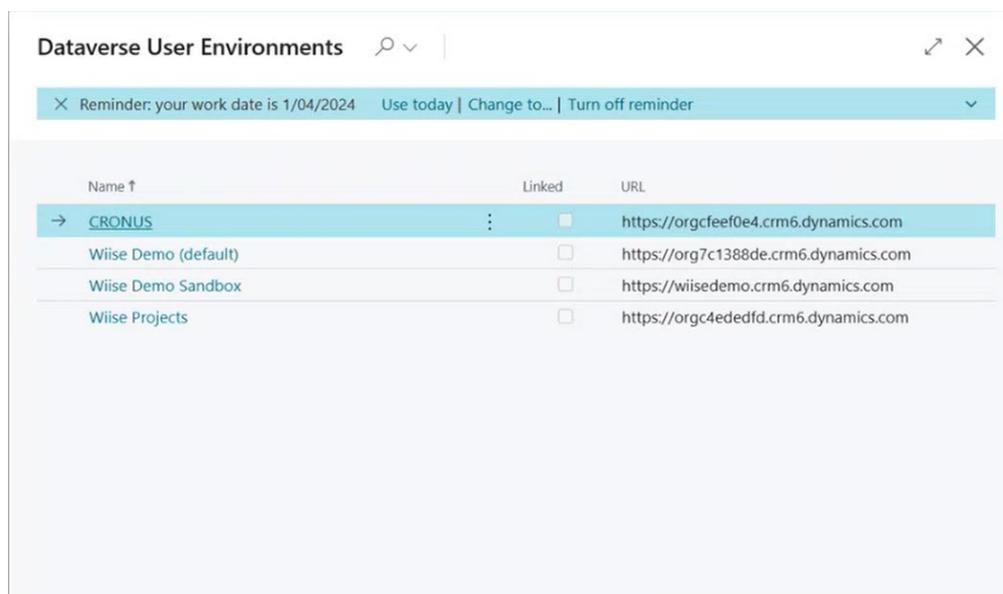
NOTE: If you are a Wiise partner do not have access to the Wiise GitHub repository please contact support@wiise.com to request access.

Dataverse Connector within Wiise/ Business Central

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



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



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

Dataverse Connection Setup

⌕ ✕

⚙️

SET UP THE CONNECTION

Specify the URL of the Dataverse environment. Your environments appear in the list, or you can enter the URL.

 ⋮

Sign in with an administrator user account and give consent to the application that will be used to connect to Dataverse. The account will be used one time to install and configure components that the integration requires.

[Sign in with administrator user](#)

To install and configure integration components, choose Next. This might take a few minutes.

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

Dataverse Connection Setup

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⚙️

SET UP THE CONNECTION

Specify the URL of the Dataverse environment. Your environments appear in the list, or you can enter the URL.

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Sign in with an administrator user account and give consent to the application that will be used to connect to Dataverse. The account will be used one time to install and configure components that the integration requires.

The administrator is signed in.

To install and configure integration components, choose Next. This might take a few minutes.

5. Leave the default settings as shown below and select **Next**

Dataverse Connection Setup



Choose an ownership model.
People or a team own records in Dataverse that are created from data in Business Central. We recommend the Team model.

Team 

We will create a business unit and a team in Dataverse. Members of the team will own the synchronised data and can assign records to other users or teams in the business unit.

Complete setup without synchronisation
Choose this option to enable the connection without synchronising data.

[Back](#) [Next](#) [Finish](#)

6. Select **Next**

Dataverse Connection Setup



First-time synchronisation depends on whether there is data in both business apps and the direction.

If you have data in both apps and want bi-directional synchronisation you must couple each record using match-based coupling or manually.

We can analyse both business apps and provide recommendations for your first synchronisation.

[Show synchronisation recommendations](#)

After you choose Next, you can follow the progress of your first synchronisation on the Dataverse Full Synch Review page. You might need to refresh the page to update the status.

[Back](#) [Next](#) [Finish](#)

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

Dataverse Connection Setup



SET UP VIRTUAL TABLES

Set up Business Central Virtual Tables app in a Dataverse environment to allow Business Central to send business events to Dataverse.

Use the link below to go to AppSource and get the the Business Central Virtual Table app. so you can install it in your Dataverse environment. To refresh status after you install, click back and next.

[Install Business Central Virtual Table app](#)

The Business Central Virtual Table app is not installed.

Choose Finish to set up the connection from Dataverse to Business Central and configure virtual tables in your Dataverse environment.

[Back](#) [Next](#) [Refresh](#) [Finish](#)

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

Microsoft | AppSource

All Apps Categories Industries Consulting Services Partners

Apps > Business Central Virtual Table



Business Central Virtual Table

by Microsoft

[Dynamics 365 Sales](#) [Dynamics 365 Customer Service](#) [Dynamics 365 Field Service](#) [Dynamics 365 Project Service Automation](#) [Power Automate](#)
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Microsoft Dynamics 365 Business Central Virtual Tables for Microsoft Dataverse.

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 in Microsoft Dataverse, but continues to reside in Business Central. Virtual tables are enabled for Business Central APIs, by making them available in Microsoft Dataverse as virtual tables. Custom and Standard APIs exposed in Business Central are consumable on Microsoft Dataverse and can be exposed as virtual tables. The new version adds support for data change events (CRUD events) so Dataverse virtual tables can be used in Power Automate flows.

By getting this product, I give Microsoft permission to use or share my account information so that the provider can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and

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



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 *

[Don't see your environment?](#)

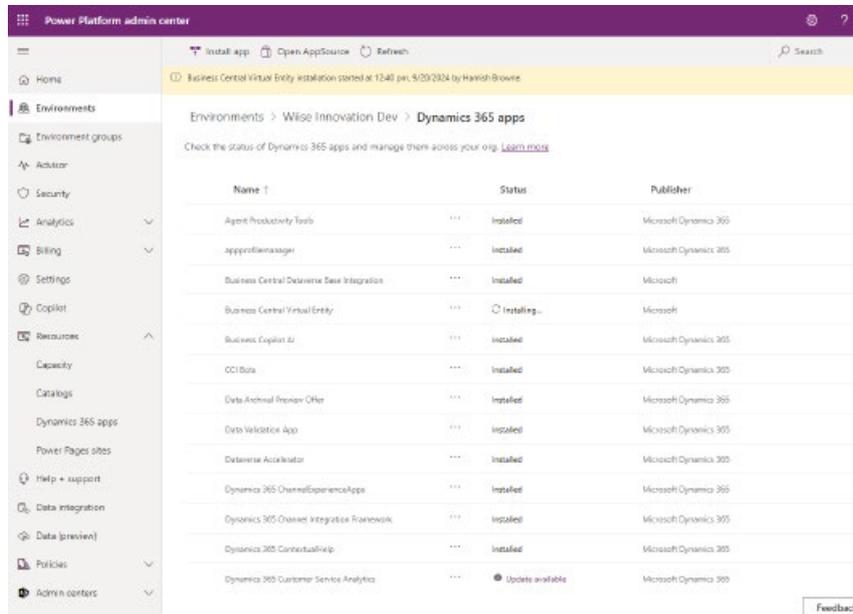
I agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

I agree to [Privacy Statement](#) and [Legal Terms](#) for importing packages into Dynamics 365

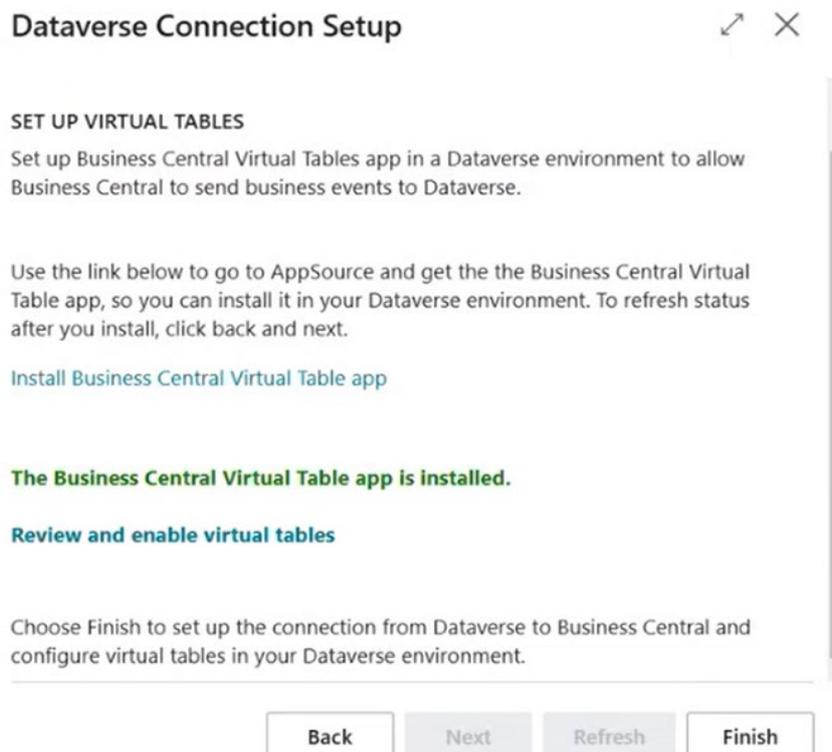
Install

Cancel

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



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

Name	Description	API Route	Visible	In Process
salesInvoice	Sales Invoice	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesInvoiceLine	Sales Invoice Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesOrder	Sales Order	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesOrderLine	Sales Order Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>

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

Available Virtual Tables - Dataverse: All

Enable Refresh Open in Dataverse

Name	Description	API Route	Visible	In Process
purchaseOrderLine	Purchase Order Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
purchaseReceipt	Purchase Receipt	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
purchaseReceiptLine	Purchase Receipt Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
retainedEarningsStatement	Retained Earnings Statement	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesCreditMemo	Sales Credit Memo	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesCreditMemoLine	Sales Credit Memo Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesInvoice	Sales Invoice	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesInvoiceLine	Sales Invoice Line	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesOrder	Sales Order	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesOrderLine	Sales Order Line	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesQuote	Sales Quote	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesQuoteLine	Sales Quote Line	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
salesShipment	Sales Shipment	v2.0	<input type="checkbox"/>	<input type="checkbox"/>
salesShipmentLine	Sales Shipment Line	v2.0	<input type="checkbox"/>	<input type="checkbox"/>

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

Dataverse Connection Setup



SET UP VIRTUAL TABLES

Set up Business Central Virtual Tables app in a Dataverse environment to allow Business Central to send business events to Dataverse.

Use the link below to go to AppSource and get the the Business Central Virtual Table app, so you can install it in your Dataverse environment. To refresh status after you install, click back and next.

[Install Business Central Virtual Table app](#)

The Business Central Virtual Table app is installed.

Review and enable virtual tables

Choose Finish to set up the connection from Dataverse to Business Central and configure virtual tables in your Dataverse environment.

Back

Next

Refresh

Finish

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

Dataverse Connection Setup

Reminder: your work date is 1/04/2024 Use today | Change to... | Turn off reminder

Home Integration Virtual Tables Synchronisation Cloud Migration Actions Automate Fewer options

Assisted Setup **Test Connection** Use Certificate Authentication

Connection from Dynamics 365 Business Central to the Dataverse environment

Environment URL Enable Data Synchron...

SDK Version Enable Virtual Tables ...

Integration Solution Settings

Solution Version Team Roles checked Yes

Dataverse Version che... Yes Entities availability ch... Yes

User Roles checked Yes

Advanced Settings

Ownership Model Coupled Business Unit

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

No.	Name	KBIZ Custom Field-TEXT-01	Contact	State	Blocked	Customer Posting Group	Balance (LCY)	Balance
10000	Adatum Corporation		Anthony Lording	SA		DOMESTIC	0.00	
20000	Trey Research		Mary Kumm	WA		DOMESTIC	5,475.00	
30000	School of Fine Art		Meagan Bond			FOREIGN	95,193.00	5
40000	Alpine Ski House		Ian Deberry			FOREIGN	7,635.00	
50000	Relecloud		Mason Kingsley	TAS		DOMESTIC	15,770.00	1
60000	Customer portal example					DOMESTIC	0.00	

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

The screenshot shows the 'Dataverse Full Synch. Review' page in Dynamics 365 Business Central. The table below represents the data visible in the interface:

Name	Job Queue Entry Status	Active Sess...	Direction	To Int. Table Job Status	From Int. Table Job Status	Recommendation
CONTACT			Bidirectional			Review Selected Coupling Criteria
CURRENCY			To Integrati...			Review Selected Coupling Criteria
CUSTOMER			Bidirectional			Full Synchronisation
ITEM UOM						Selected Coupling Criteria
ITEM-PROD...						Coupling Criteria
OPPORTUNI...						Coupling Criteria
PAYMENT T...						Selected Coupling Criteria
PILINE-WOR...						Coupling Criteria
PILINE-WOR...						Coupling Criteria
PLHEADER-...						Coupling Criteria
PLLINE-PRO...						Coupling Criteria
POSTEDSAL...						Coupling Criteria
PROJECTTASK						Coupling Criteria
RESOURCE ...			To Integrati...			Select Coupling Criteria
RESOURCE ...			Bidirectional			Review Selected Coupling Criteria
SHIPMENT ...			To Integrati...			Review Selected Coupling Criteria
SHIPPING A...			To Integrati...			Review Selected Coupling Criteria
SVCITEM-C...			Bidirectional			No Records To Synchronise Now
UNIT GROUP			To Integrati...			Review Selected Coupling Criteria
VENDOR			Bidirectional			Select Coupling Criteria

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

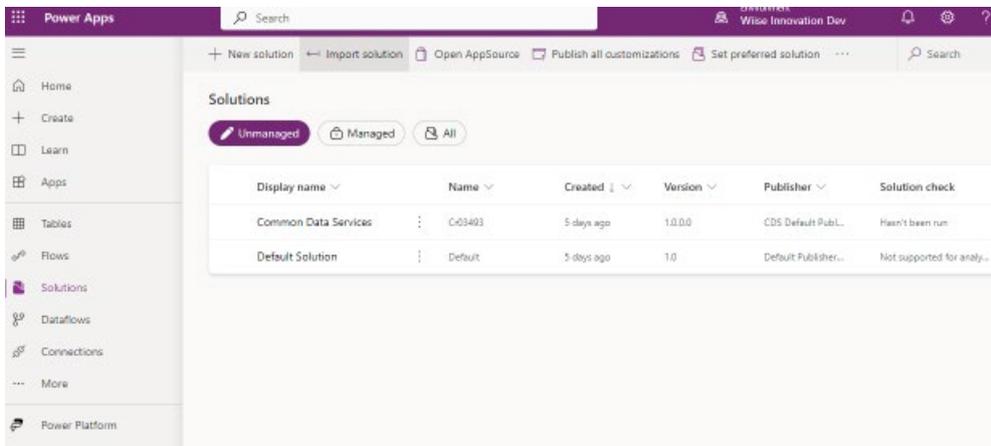
The screenshot shows the 'Integration Synchronization Jobs' table in Dynamics 365 Business Central. The table below represents the data visible in the interface:

Start Date/Time	Coupled	Inserted	Modified	Deleted	Unchanged	Failed	Skipped	Direction	Type
10/25/2024 11:45...	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



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

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.

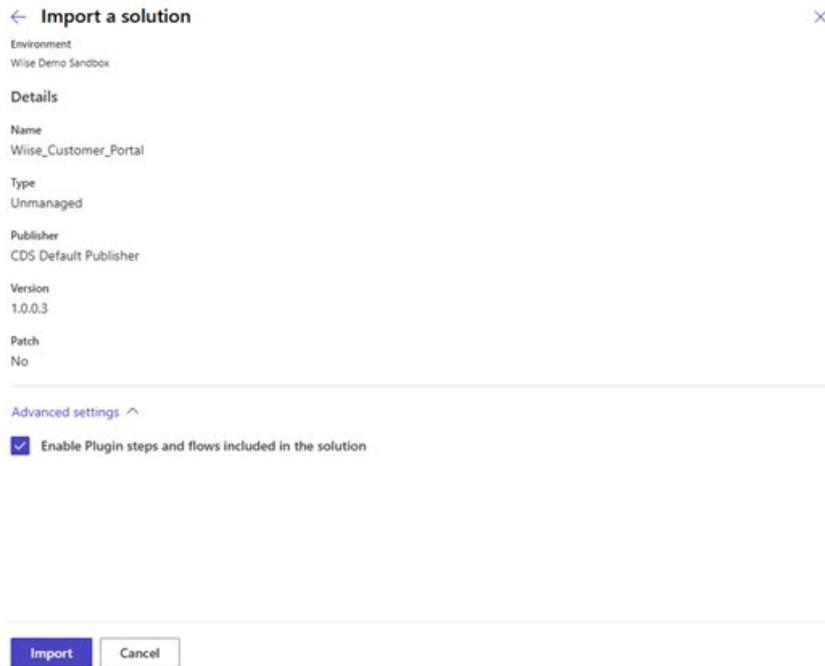
[Learn more](#)

Next

Cancel



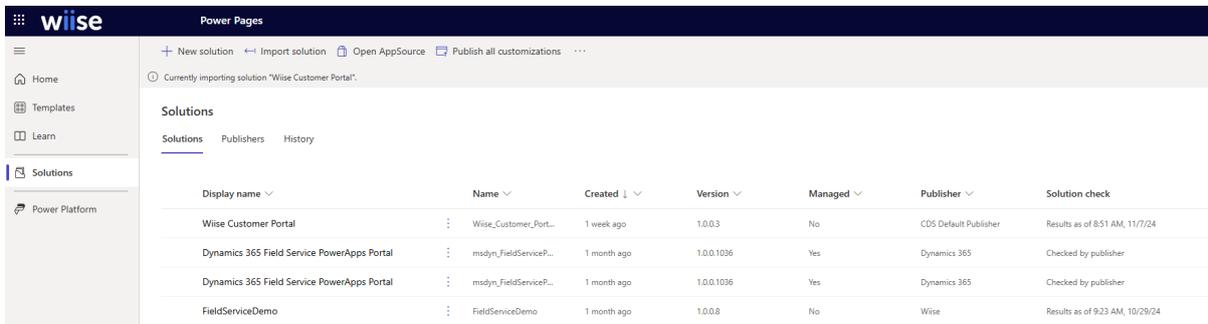
4. Select **Next** again



5. Click on Import

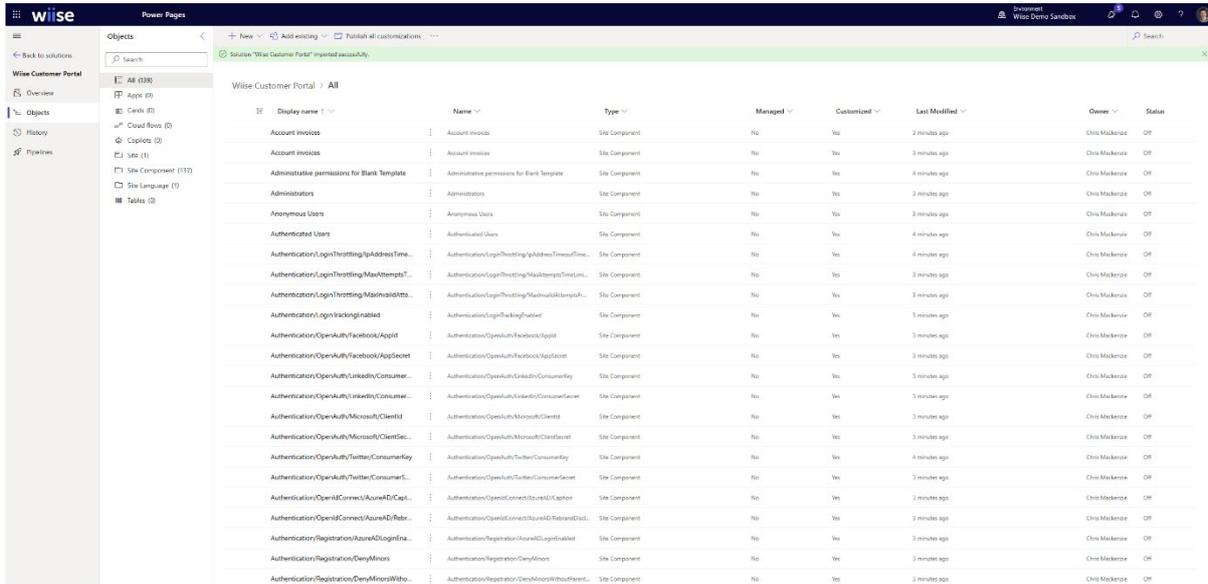
6. The solution is now importing. This will take 10-20mins

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





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



The Wiise Customer Portal Page is now live. Your last step will be to share both apps to the relevant users as per Microsoft's guidance found here

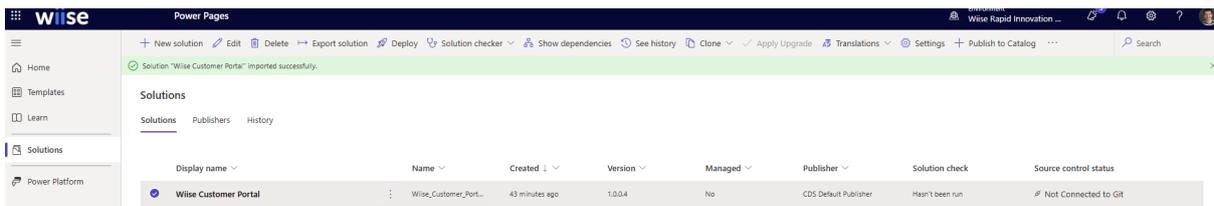
<https://learn.microsoft.com/en-us/power-apps/maker/mQdel-driven-apps/share-model-driven-app>



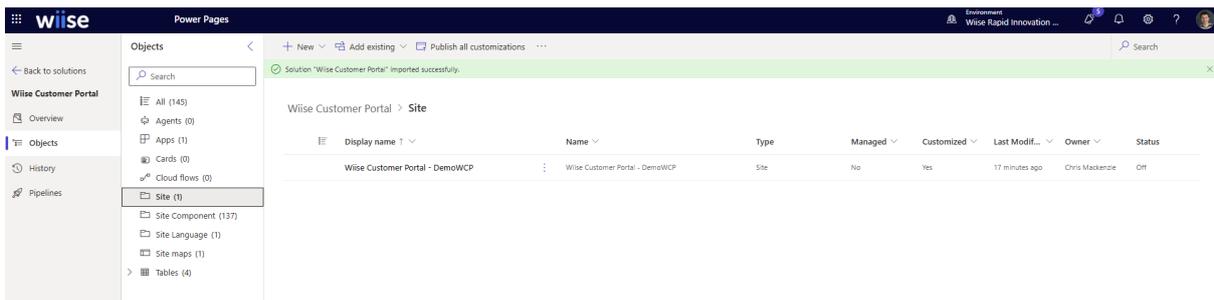
Synchronization of the Sales orders using Sync relationships

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 synthetic relationships so there is an authentication level protection on each of those pages.

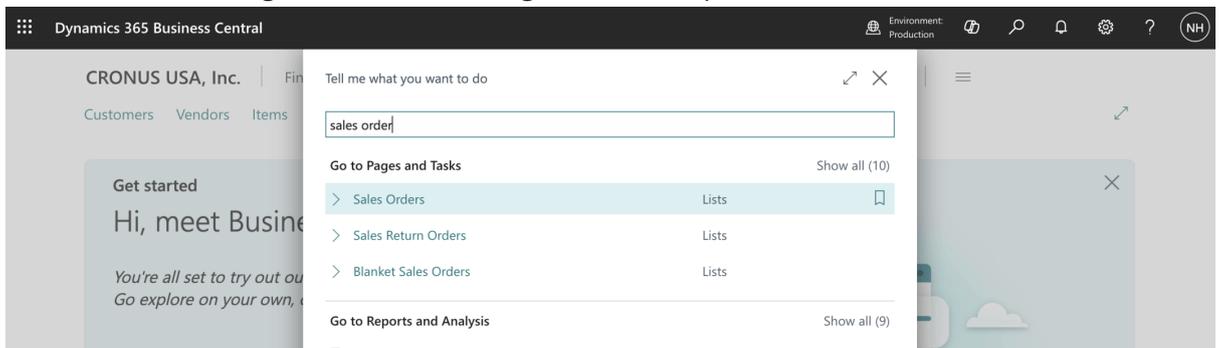
1. select Site and choose, inactive sites and choose the solution just imported via edit



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



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.



5. I navigated to the Sales Orders list

Dynamics 365 Business Central

Environment: Production

Sales Orders

Sales Orders: All

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned U ID
S-ORD1010...	10000	Adatum Corporation			
S-ORD1010...	10000	Adatum Corporation			
S-ORD1010...	30000	School of Fine Art			
S-ORD1010...	40000	Alpine Ski House			
S-ORD1010...	10000	Adatum Corporation	Y-3	YELLOW	
S-ORD1010...	10000	Adatum Corporation	Y-4	YELLOW	
S-ORD1010...	10000	Adatum Corporation	Y-5	YELLOW	
S-ORD1010...	10000	Adatum Corporation	W-1	WHITE	
S-ORD1010...	10000	Adatum Corporation	SVC-1	MAIN	

Details Attachments (0)

Customer Statistics

Customer No.	10000
Balance (\$)	0.00
Balance (\$) As Vendor	0.00
Sales	
Outstanding Orders (\$)	23,856.08
Shipped Not Invd. (\$)	0.00
Outstanding Invoices (\$)	19,184.20
Payments	
Payments (\$)	232,466.11
Refunds (\$)	0.00
Last Payment Receipt Date	3/23/2023

6. I reviewed the Sales Orders list

Power Apps

Environment: Develop

Search

+ New table Open Edit Import Export Properties Publish

Tables

Create new tables Use AI or make tables yourself from blank, SharePoint lists, Excel, or .CSV files.

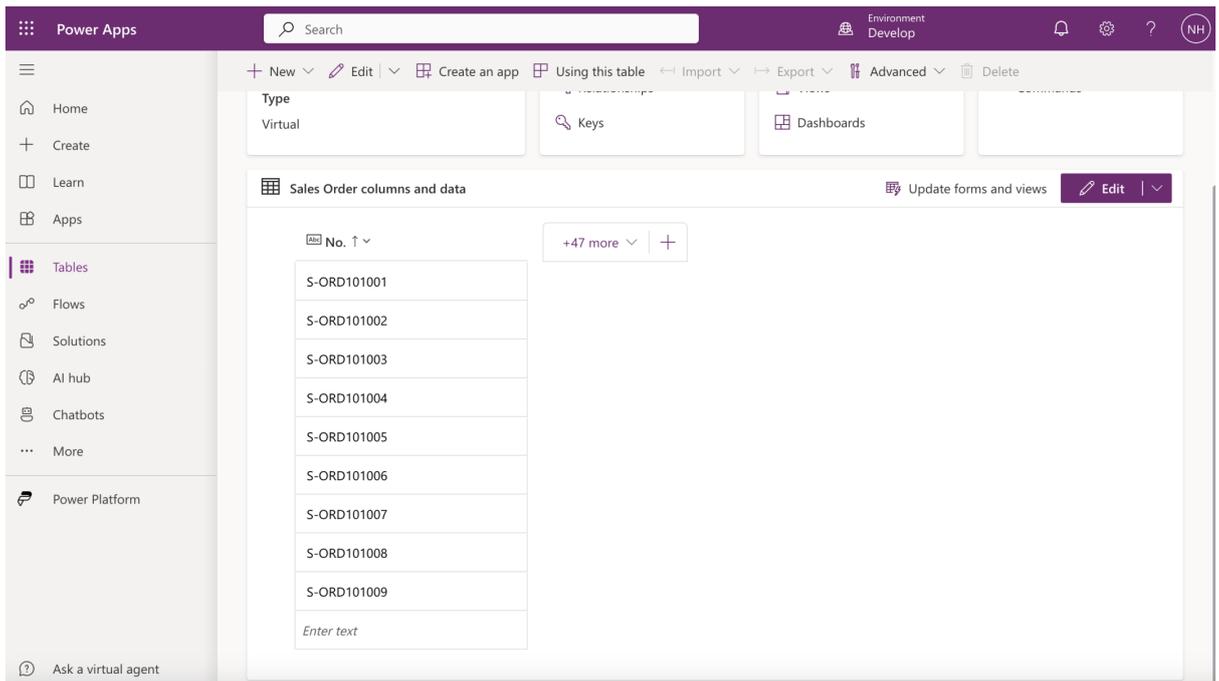
Create a virtual table

Recommended Custom All

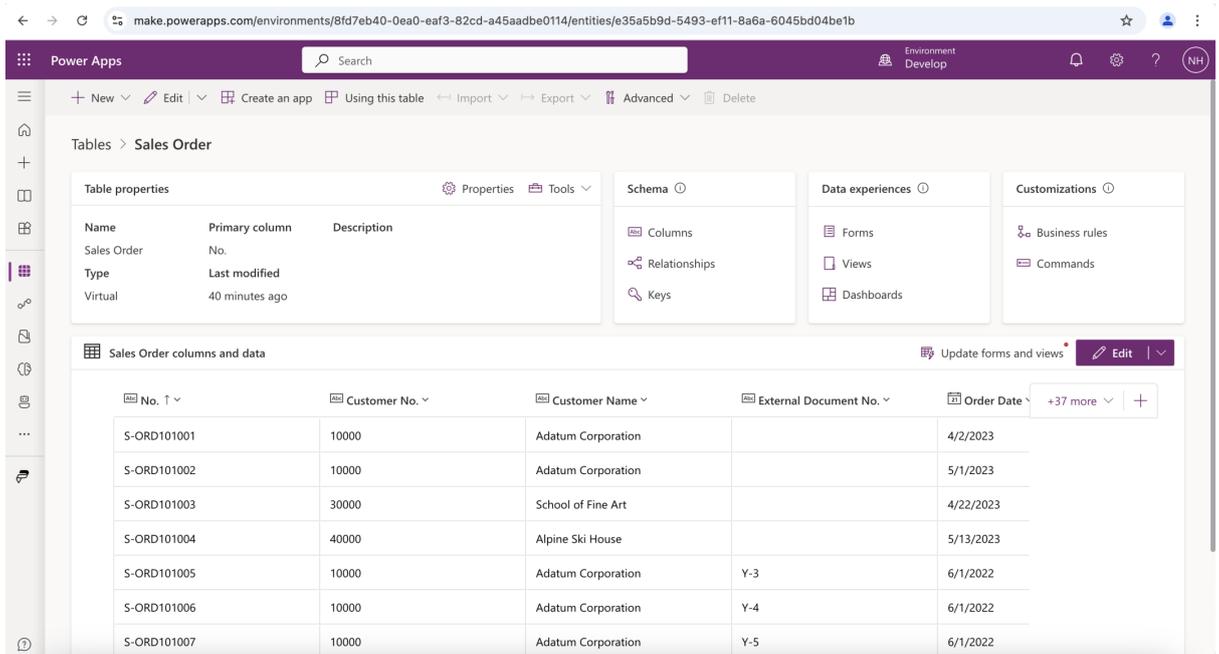
Table ↑	Name	Type	Managed	Customized	Customizable	Tags
Sales Invoice	dyn365bc_salesi...	Virtual	Yes	No	Yes	Standard
Sales Invoice Line	dyn365bc_salesi...	Virtual	Yes	No	Yes	Standard
Sales Order	dyn365bc_saleso...	Virtual	Yes	No	Yes	Standard
Sales Order Line	dyn365bc_saleso...	Virtual	Yes	No	Yes	Standard
Sales Quote	dyn365bc_salesq...	Virtual	Yes	No	Yes	Standard
Sales Quote Line	dyn365bc_salesq...	Virtual	Yes	No	Yes	Standard

https://make.powerapps.com/environments/8fd7eb40-0ea0-eaf3-82cd-a45aadbe0114/entities#

7. I navigated to the Sales Order Virtual Table

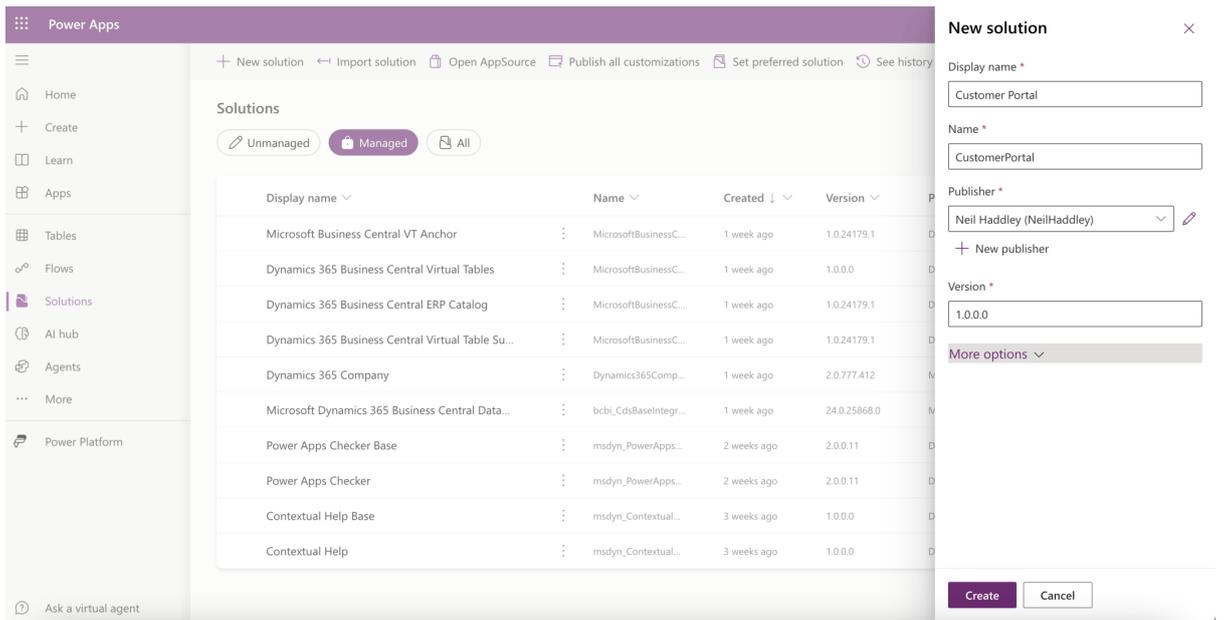


8. I was able to see the same records

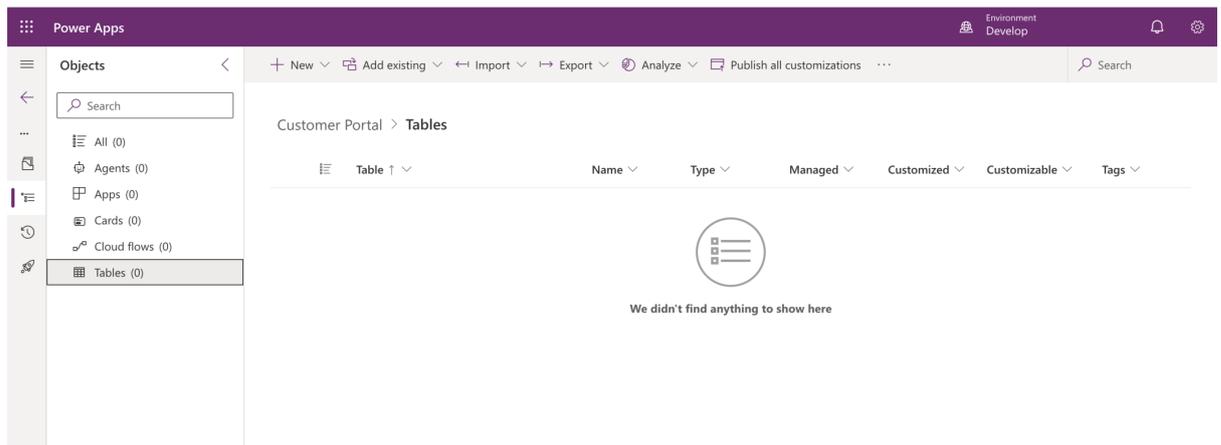


I added columns to the display Solution

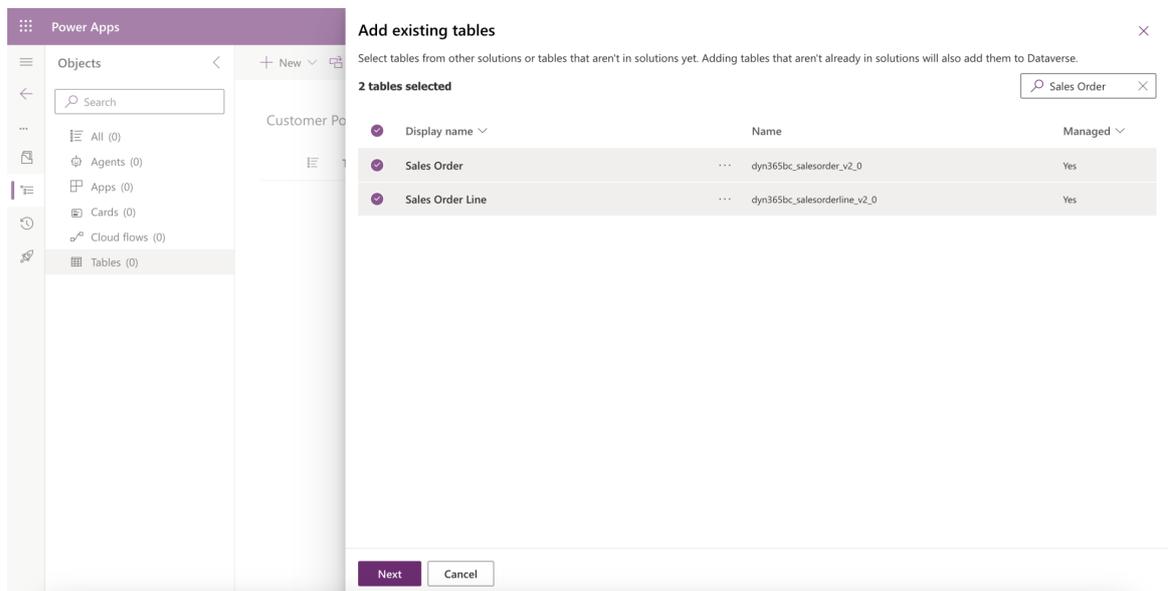
I created a Power Platform Solution



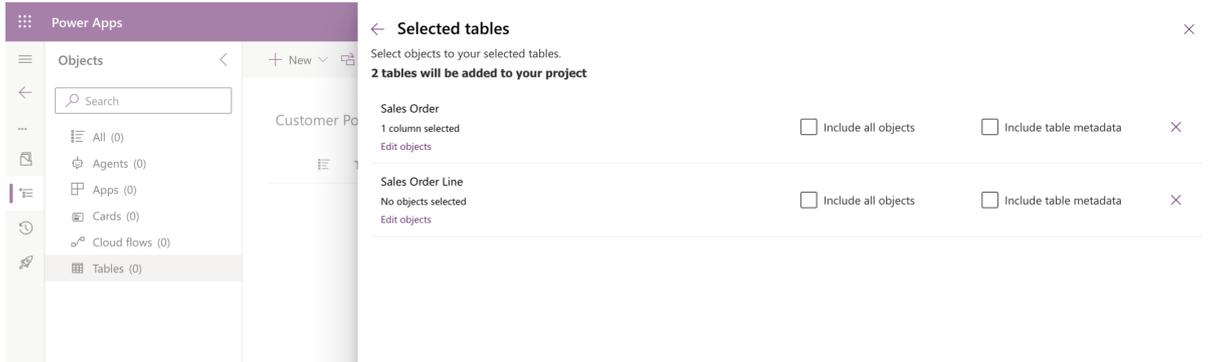
9. Created a Customer Portal Solution



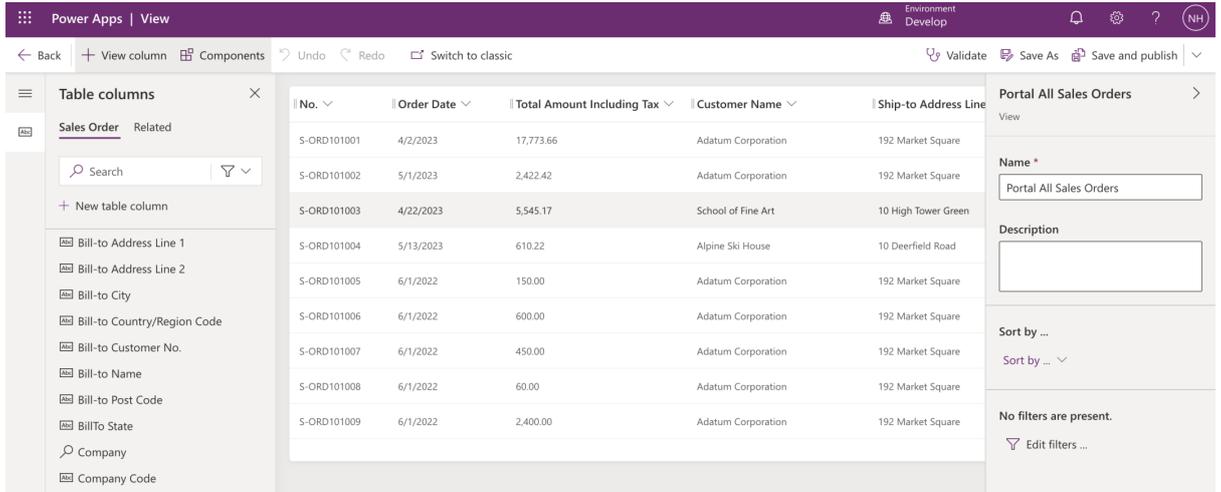
10. I navigated into the new solution



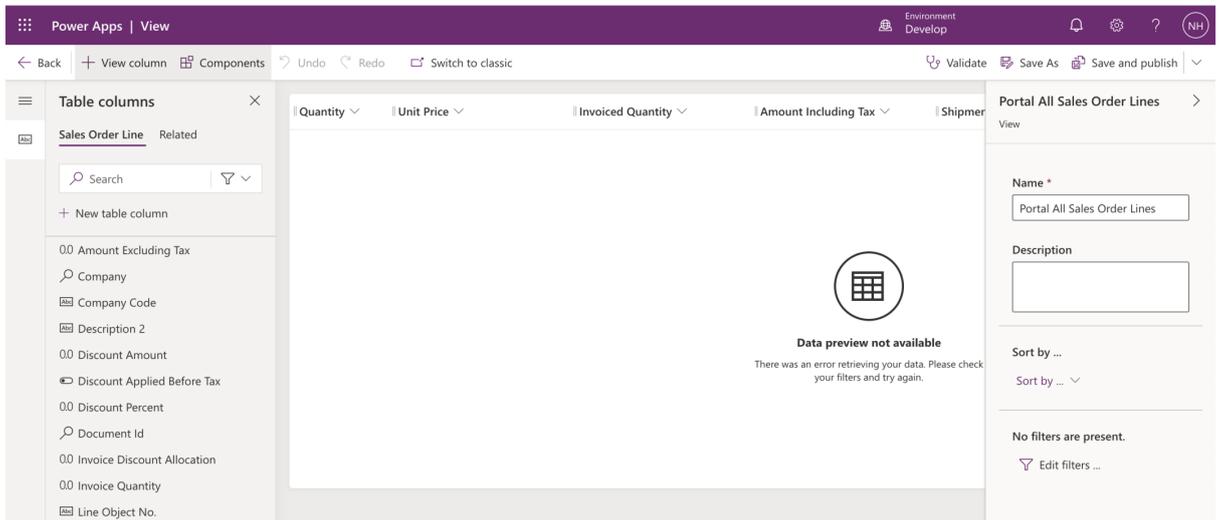
11. I added the **Sales Order** and **Sales Order Line** tables



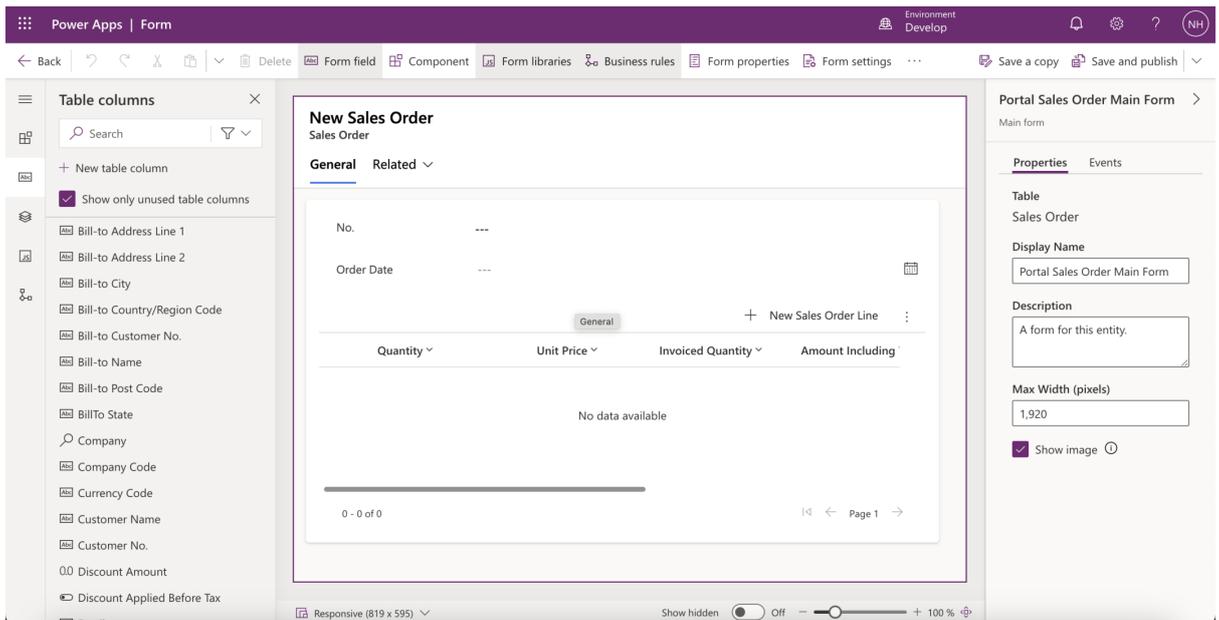
12. Two tables will be added to the solution



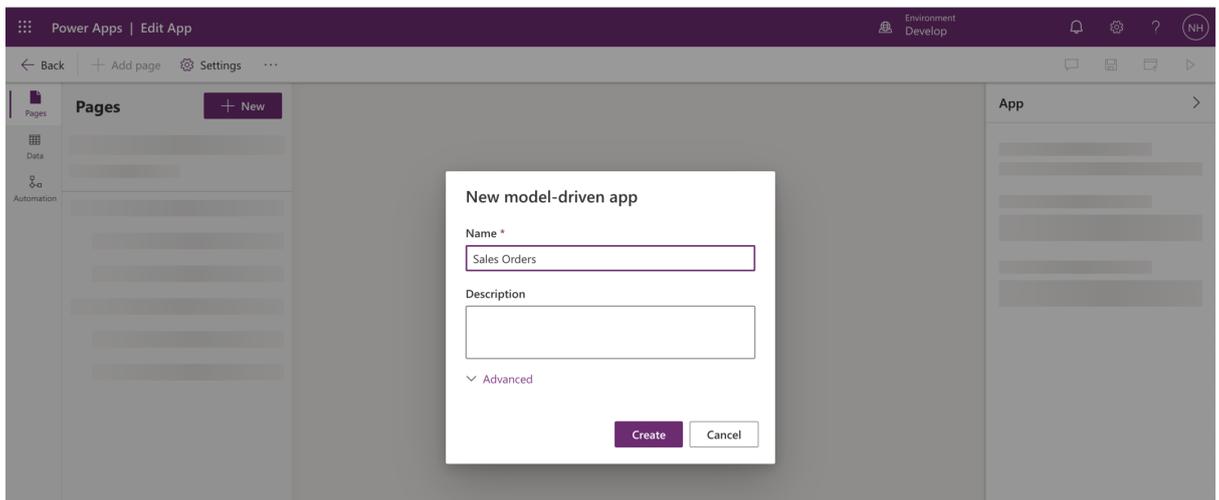
13. I added a **Portal All Sales Orders** view to the **Sales Order** table



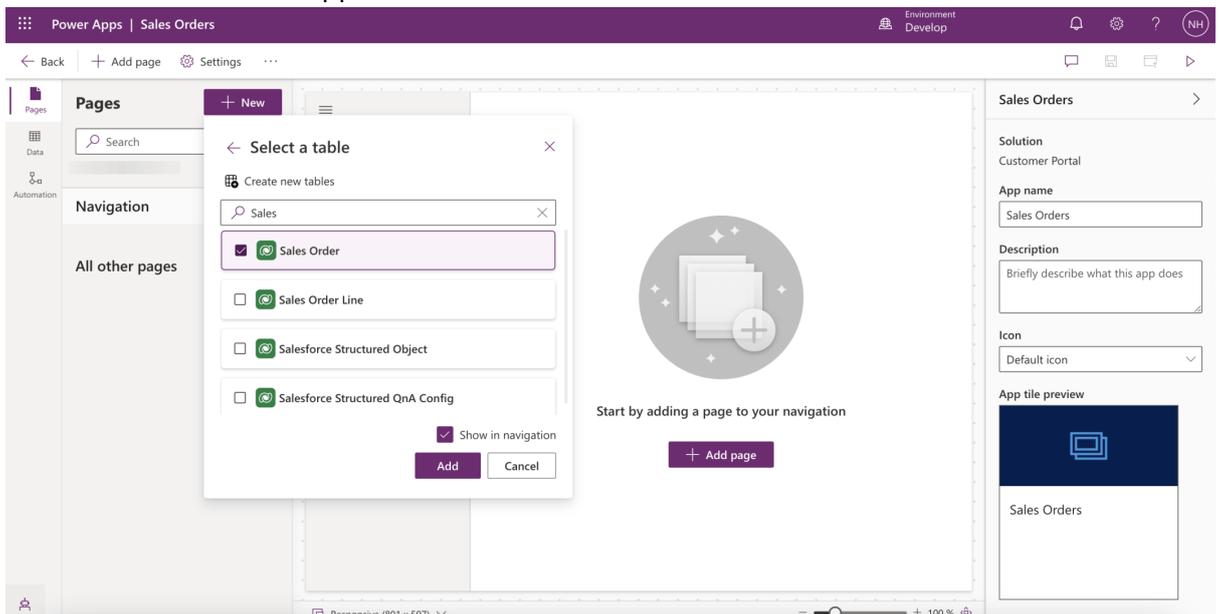
14. I added a **Portal All Sales Orders Lines** view to the **Sales Order Line** table



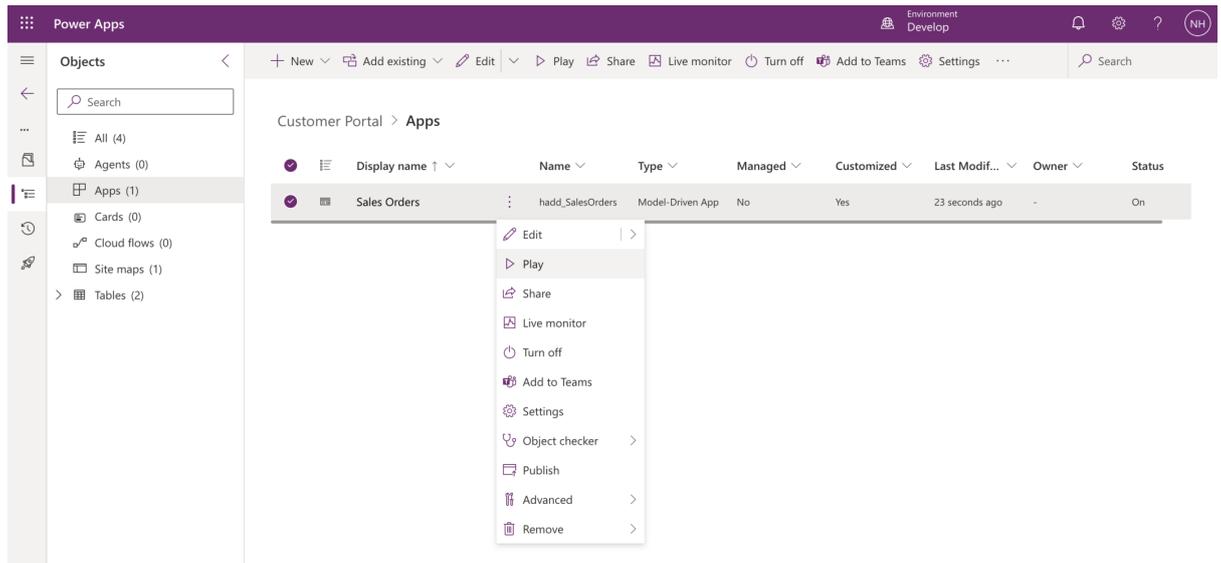
15. I added a **Portal Sales Order Main Form** to the **Sales Order** table



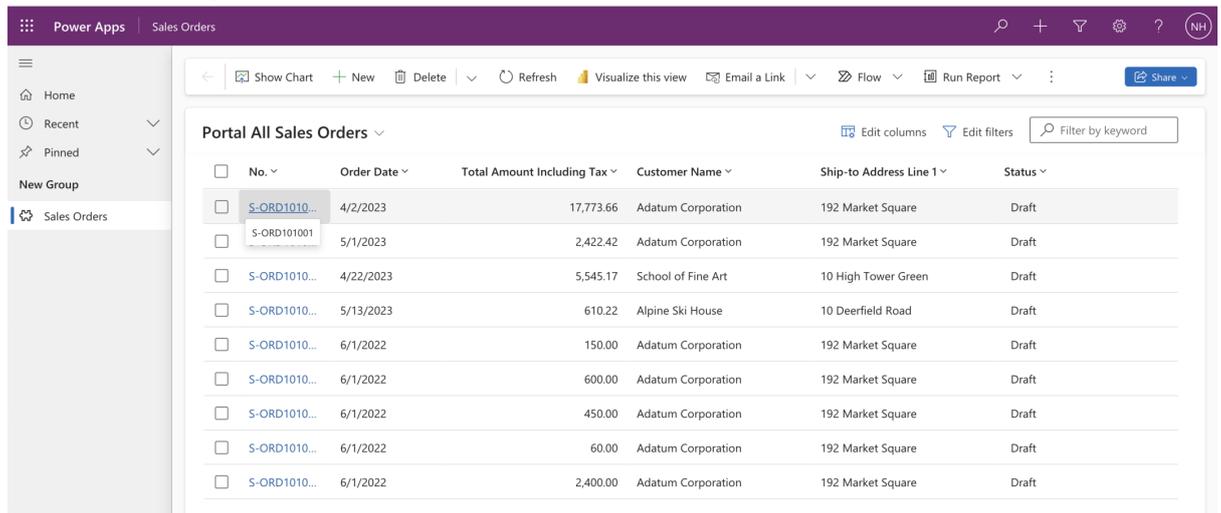
16. I added a **Sales Orders** application to the solution



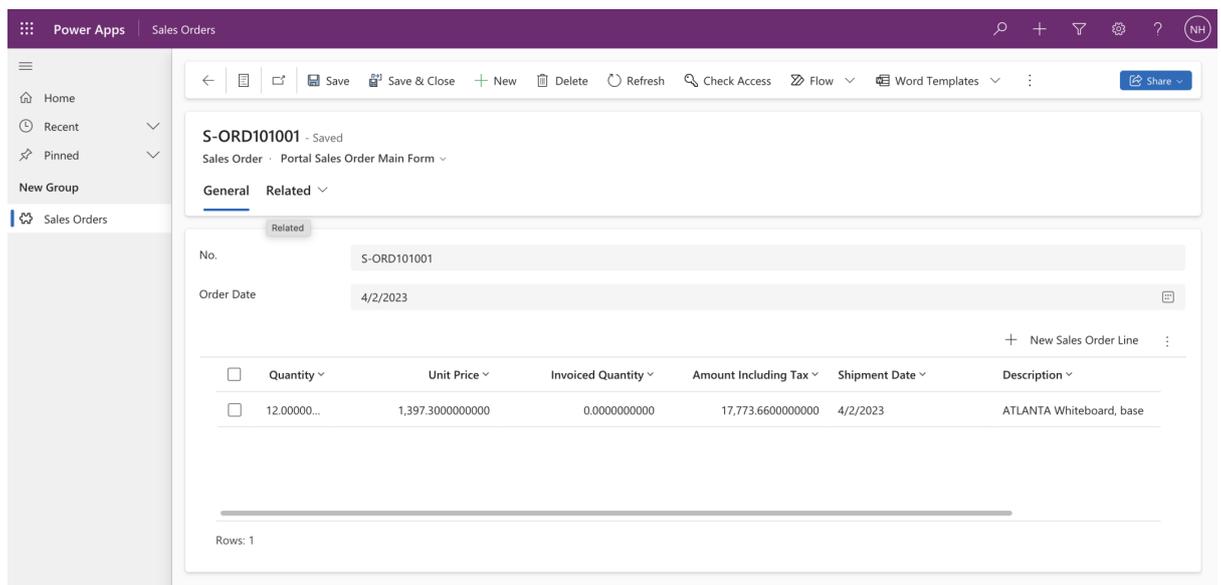
17. I added the **Sales Order** table to the **Sales Orders** application



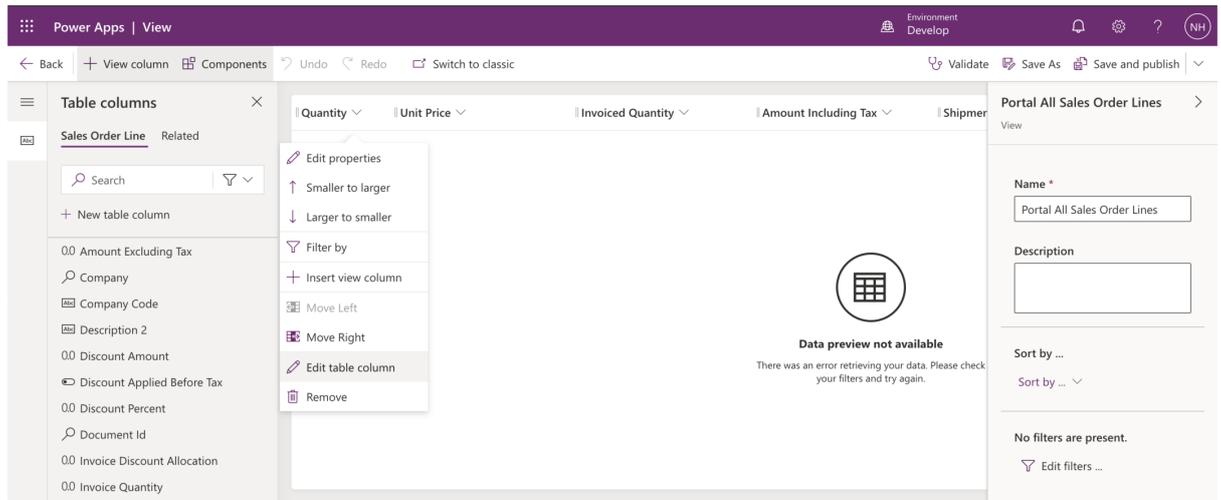
18. I clicked the **Play** button



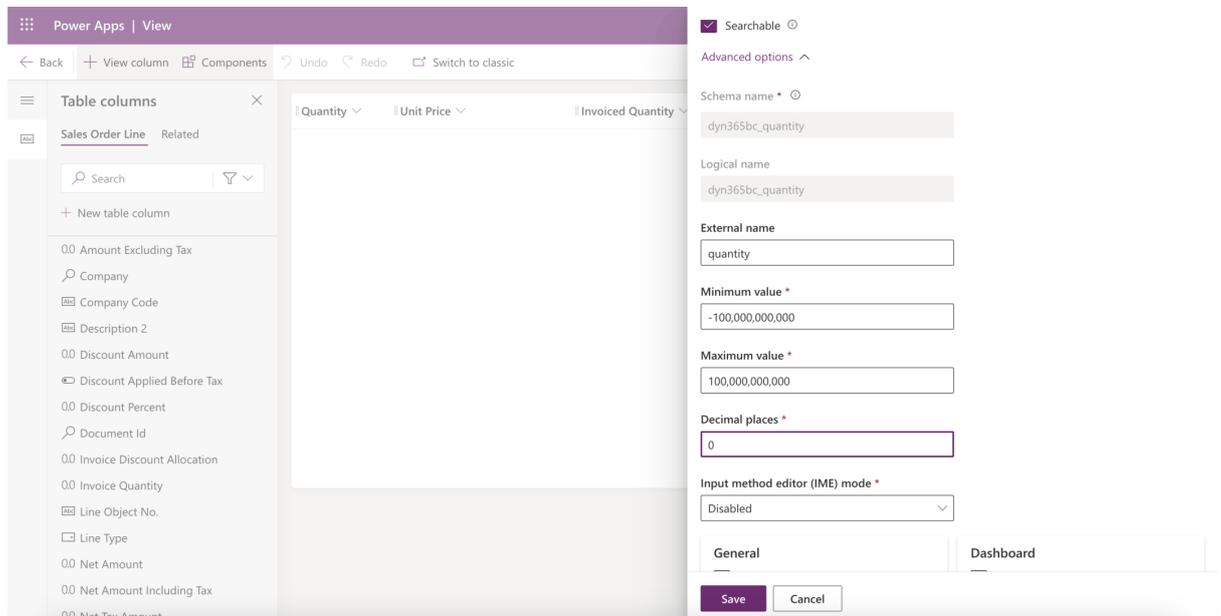
19. I selected a **Sales Order**



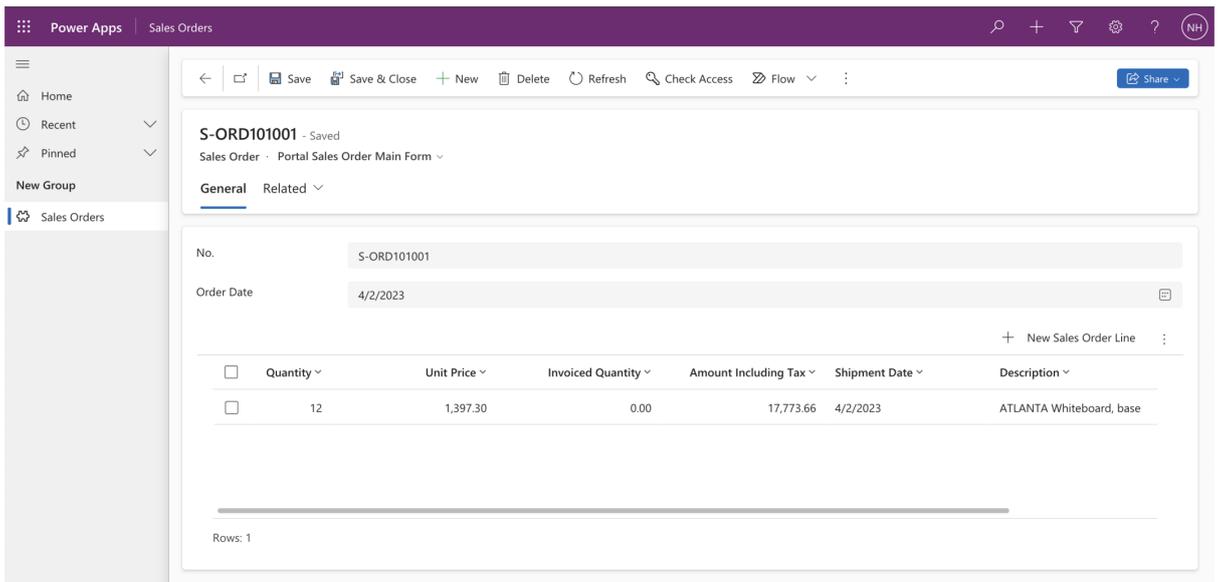
20. I reviewed the **Sales Order Lines** associated with the selected **Sales Order**



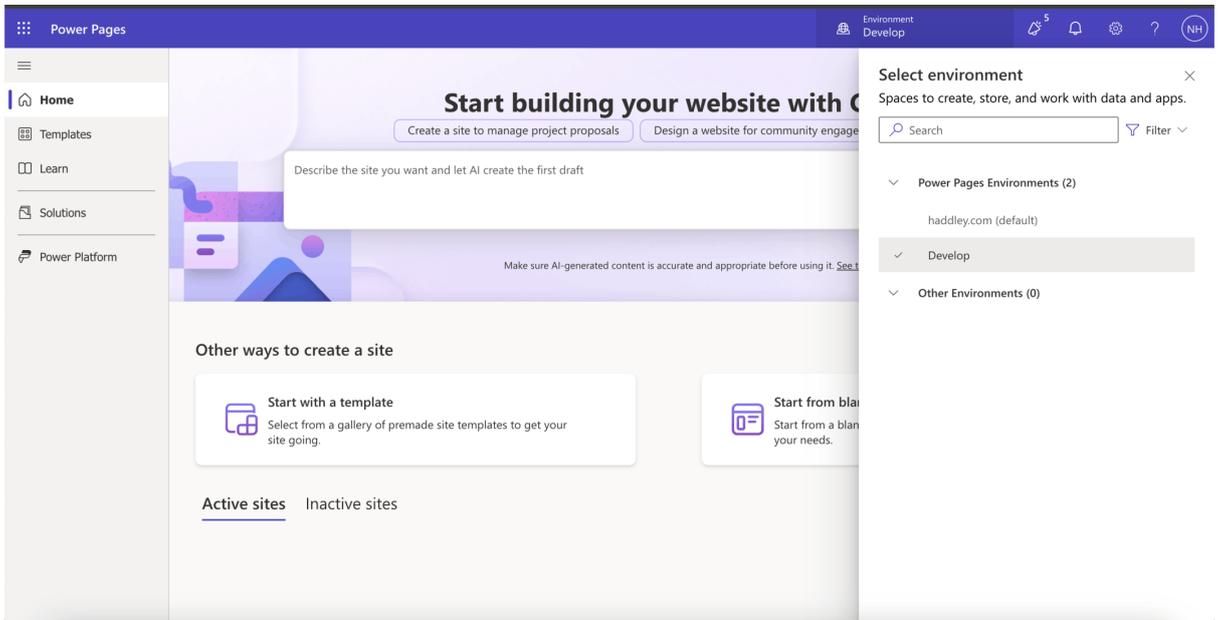
21. I edited the Quantity, Unit Price, Invoiced Quantity and Amount Including Tax table columns



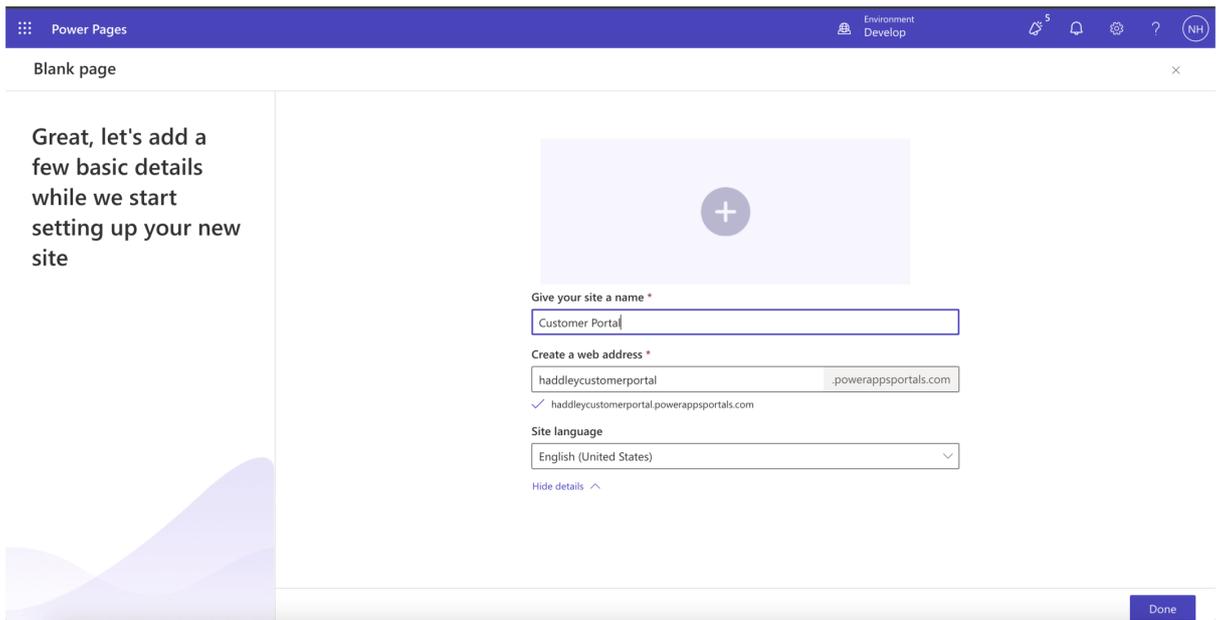
22. I updated the number of Decimal places



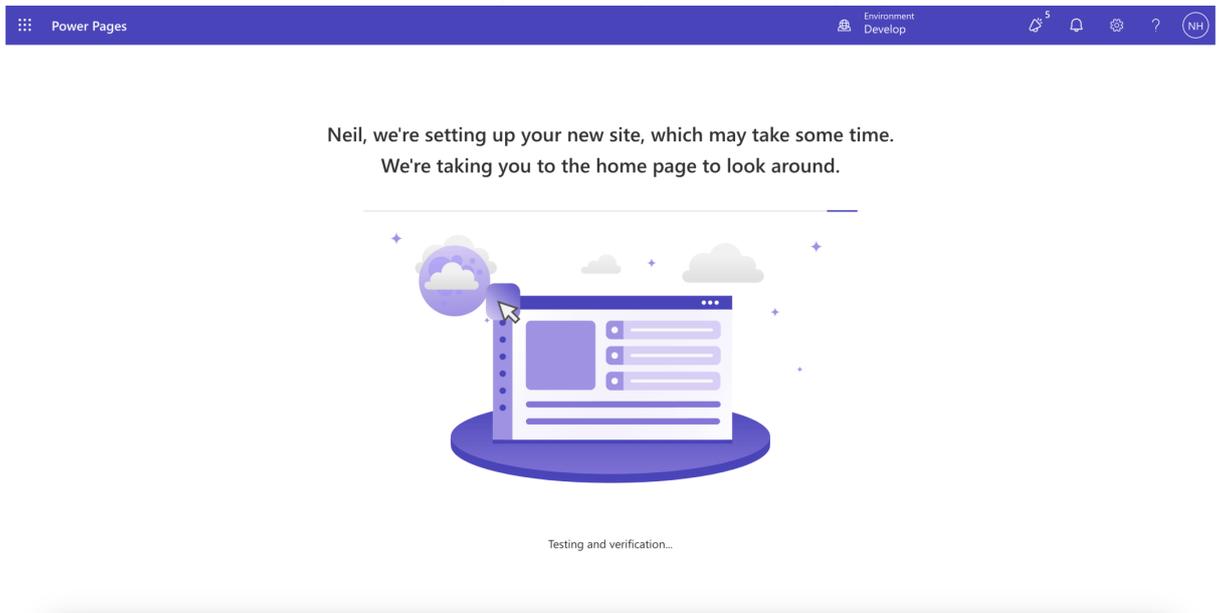
23. I reviewed the **Sales Order Lines** associated with the selected **Sales Order**



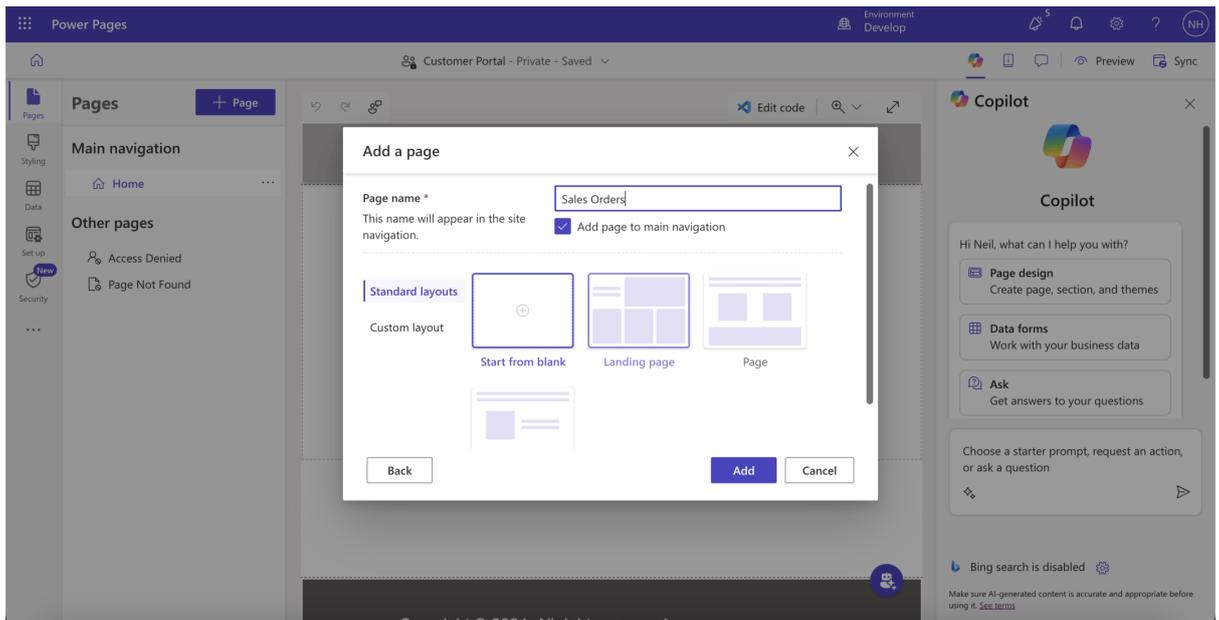
24. I navigated to <https://make.powerpages.microsoft.com/>



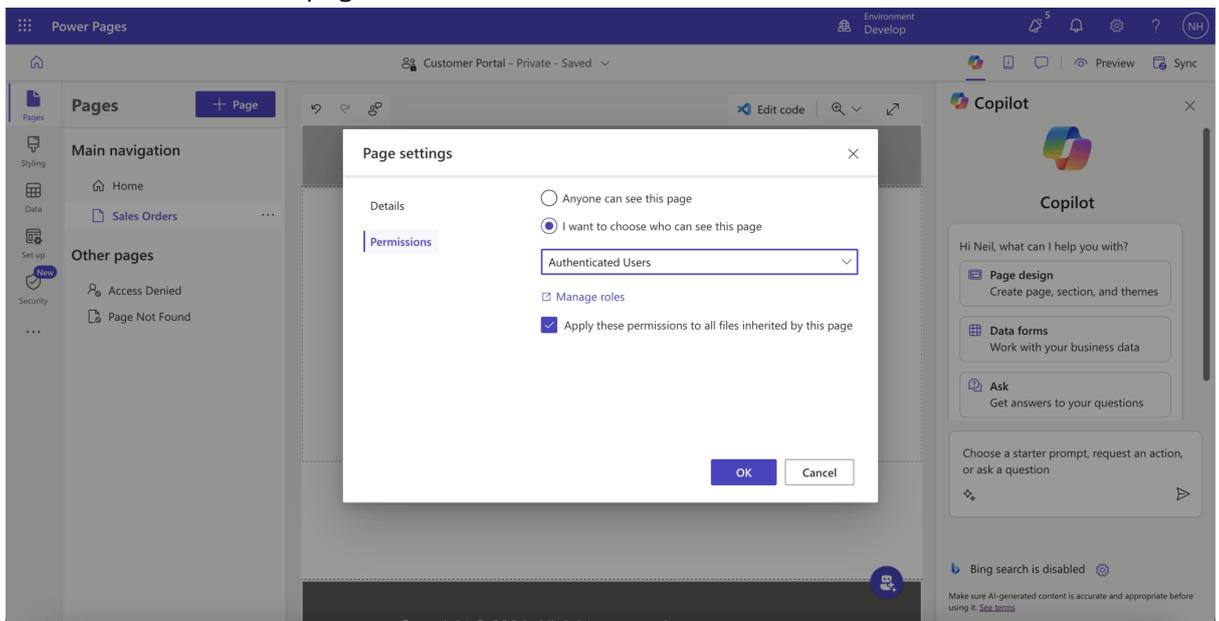
25. I selected web address **https://haddleycustomerportal.powerappsportals.com/**



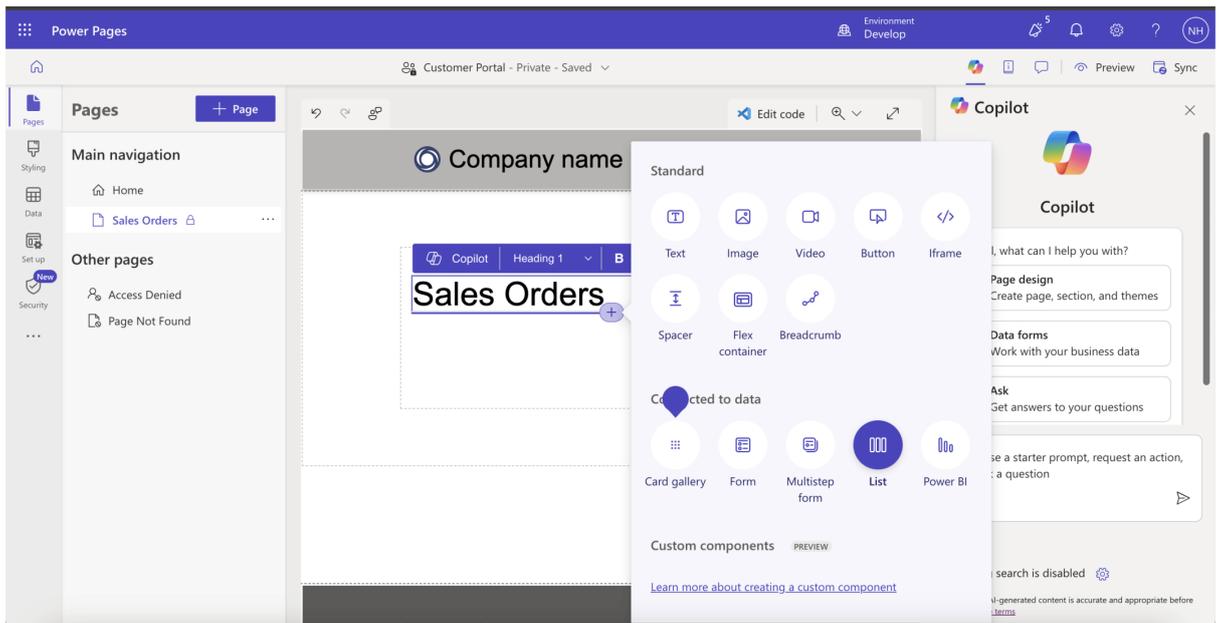
26. The new site was setup



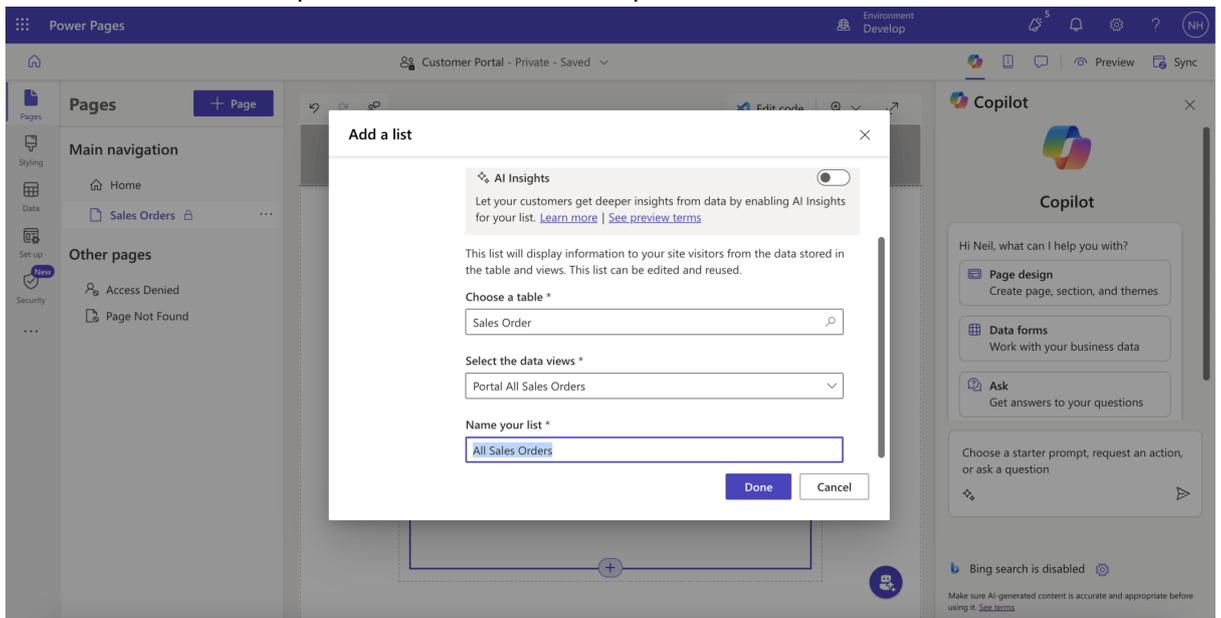
27. I added a **Sales Orders** page



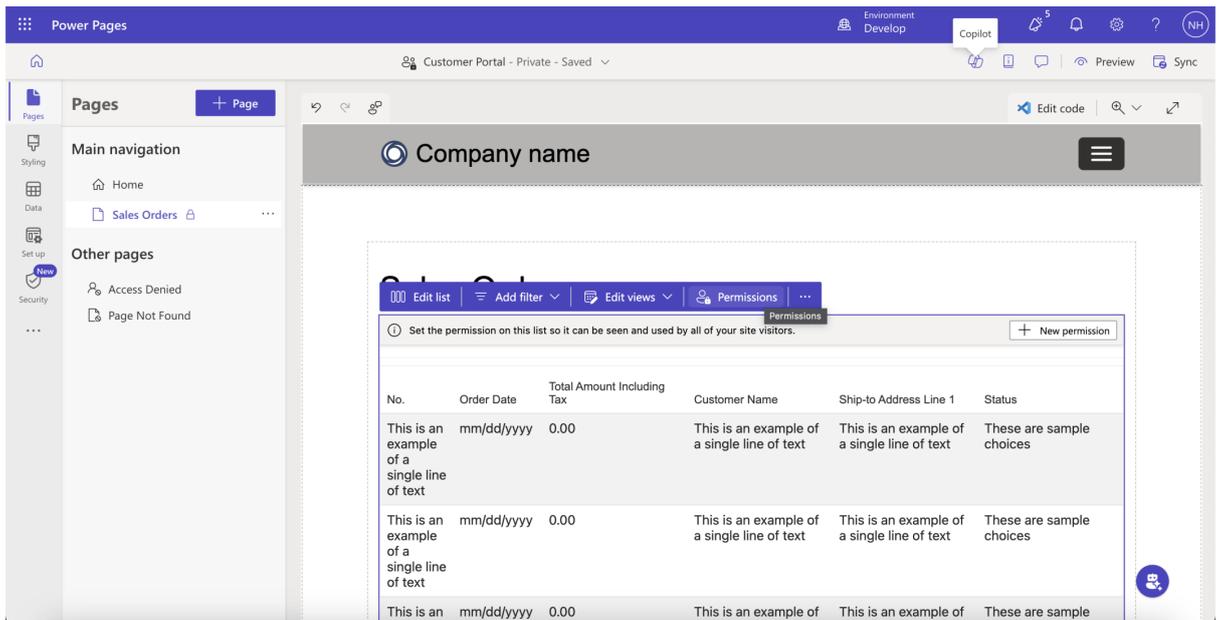
28. The **Sales Orders** page will only be shown when an authenticated user is logged in



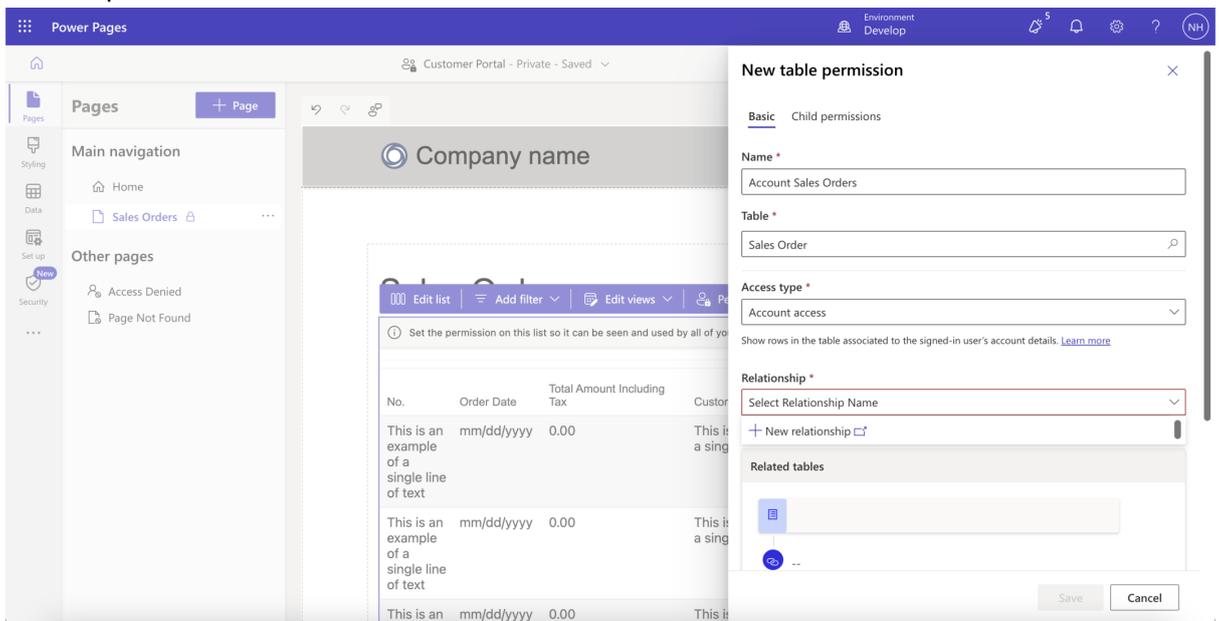
29. I added an h1 Text component. I added a List component



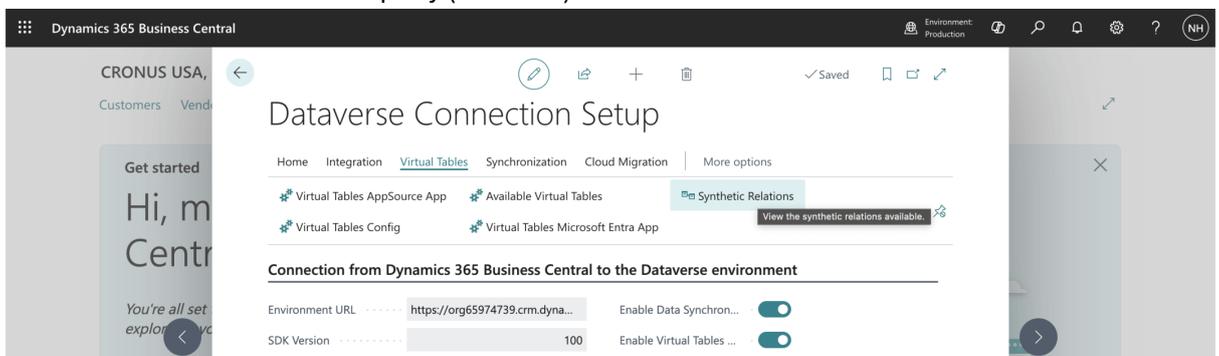
30. I selected the **Sales Order** table. I selected the **Portal All Sales Orders** view. I named the List **All Sales Orders**.



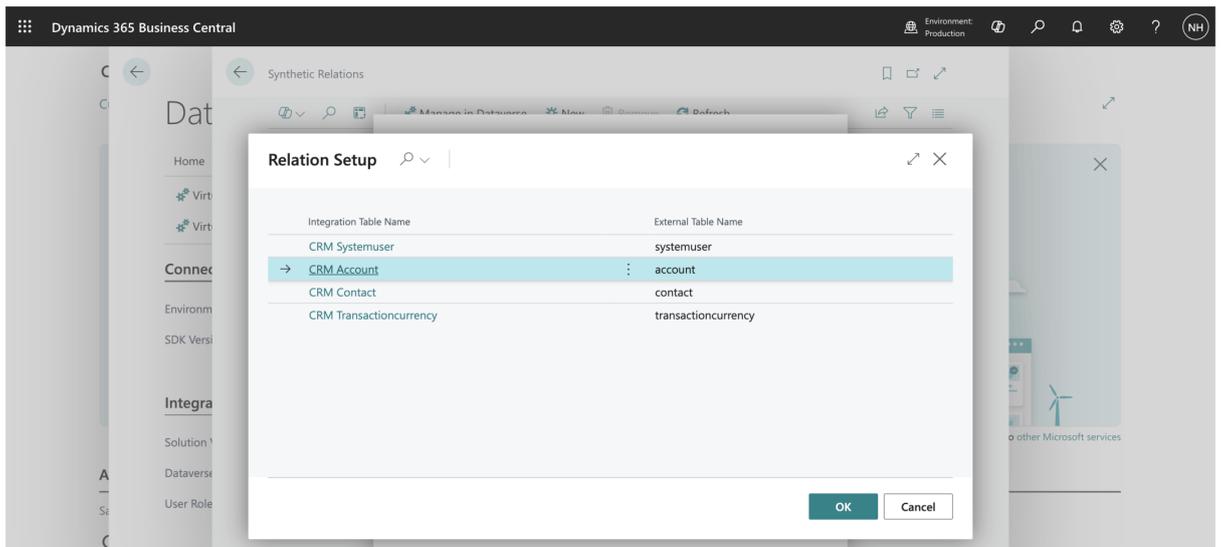
31. I added permissions



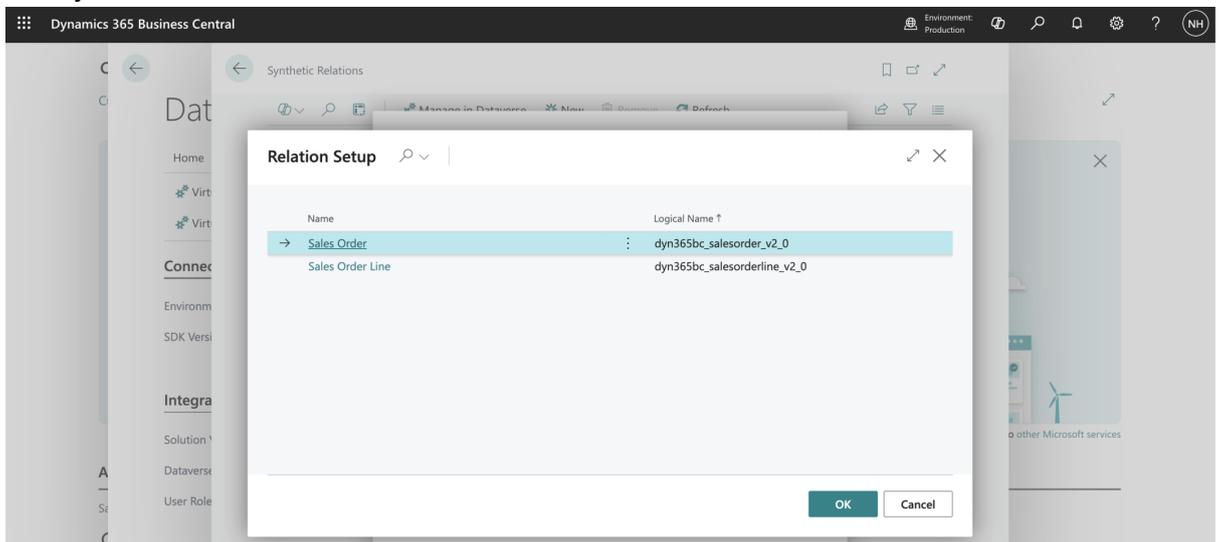
32. I added a table permission. The permission will allow users to see Sales Order rows that are associated with their company (Account).



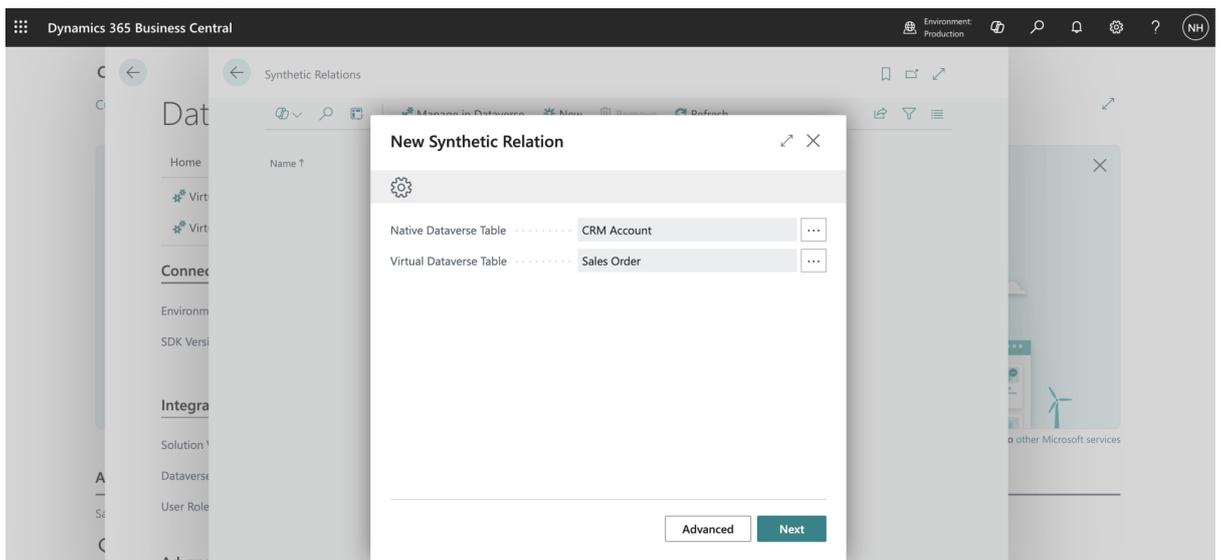
33. I added a Synthetic Relation



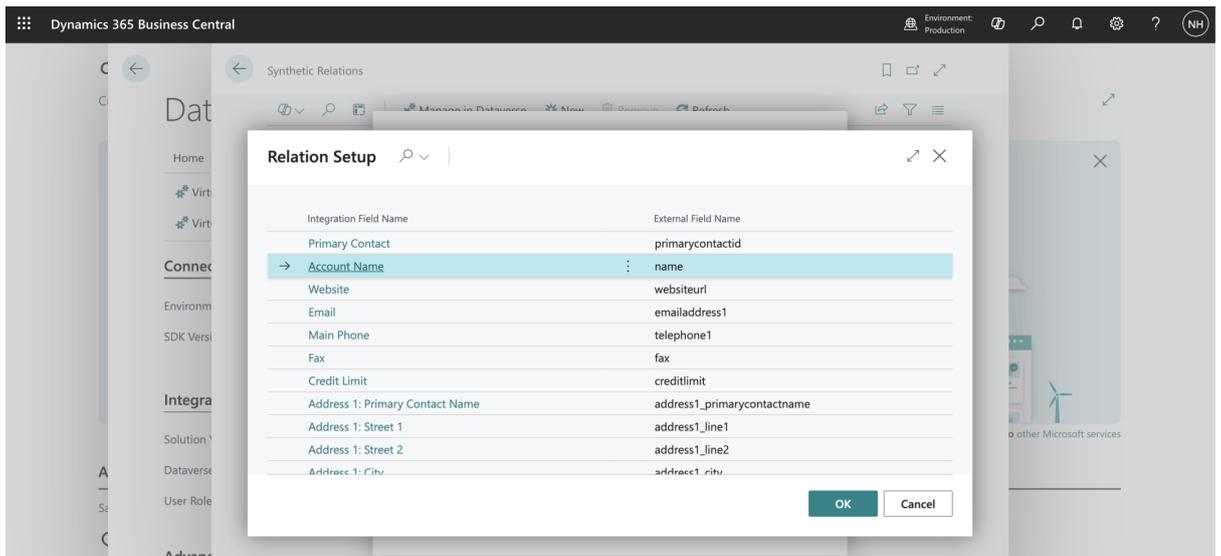
34. The Synthetic Relation connects CRM Account records...



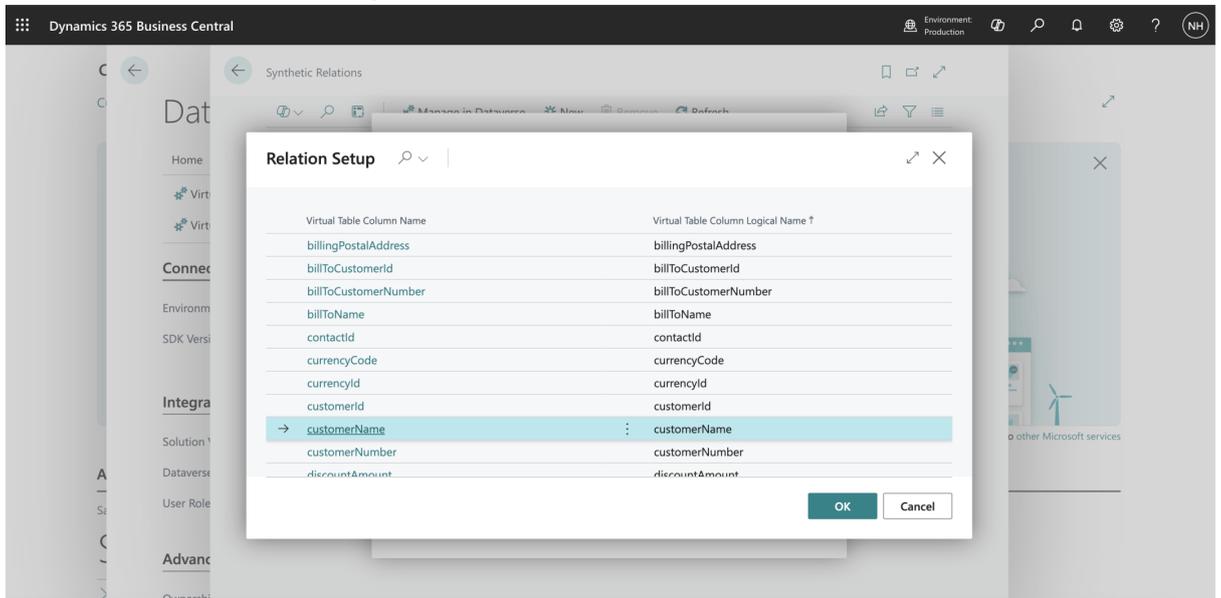
35. ... to Sales Order records



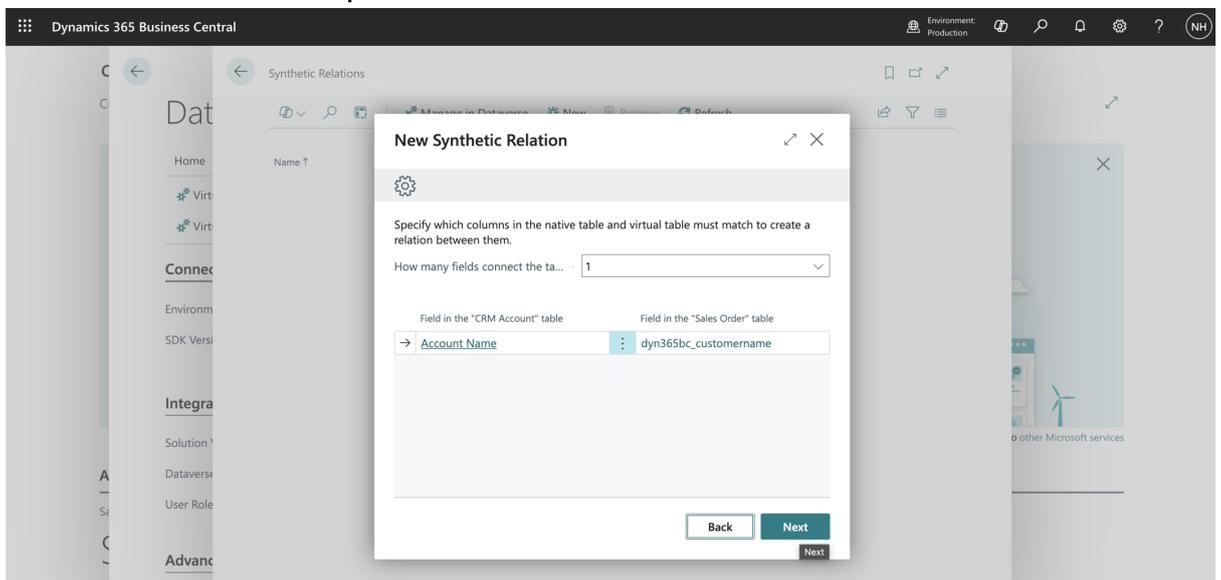
36. I clicked Next



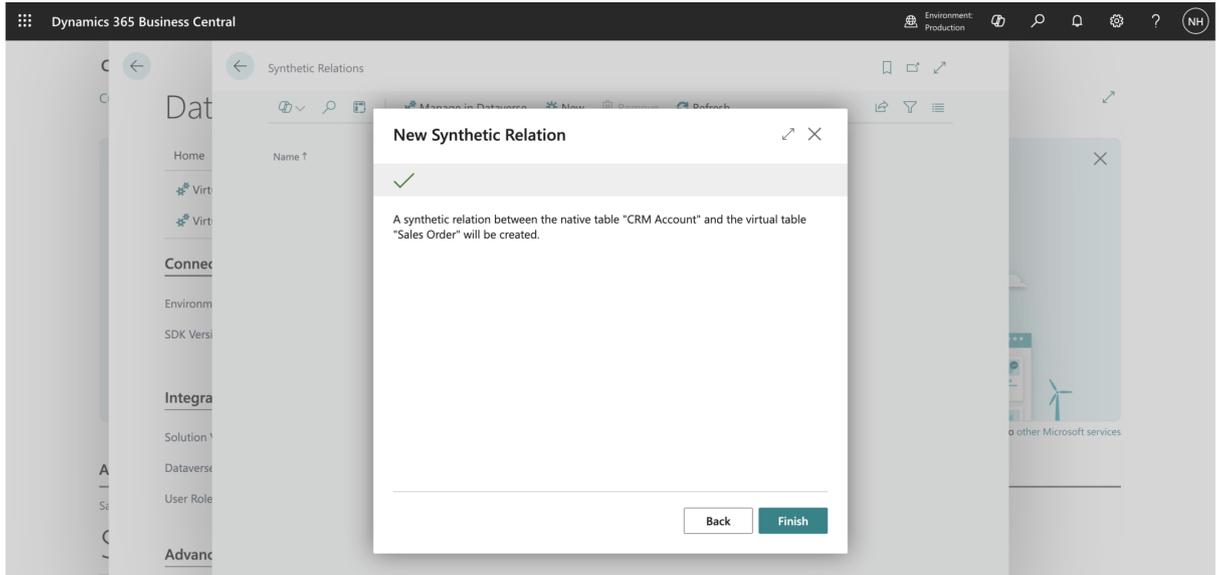
37. I selected the **CRM Account | Account Name** field



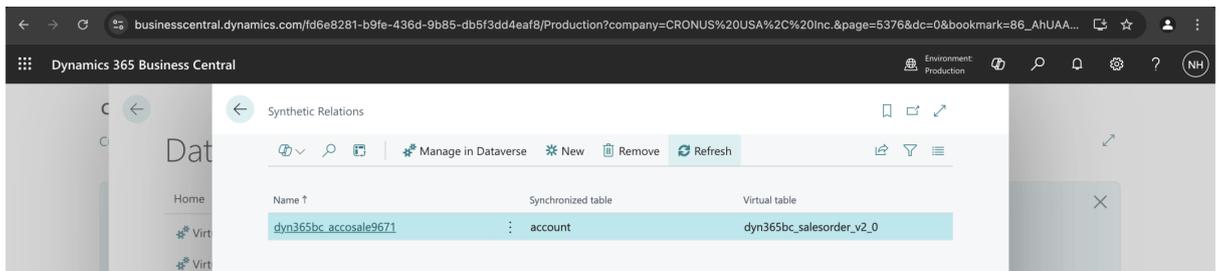
38. I selected the **Sales Order | customerName** field



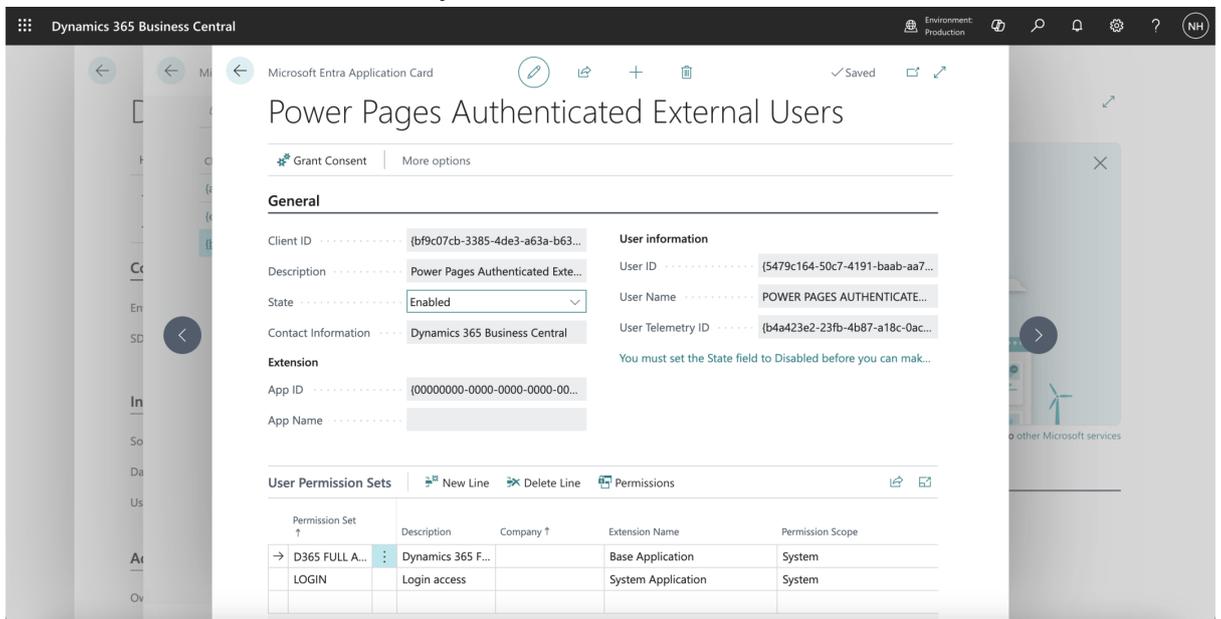
39. I clicked Next



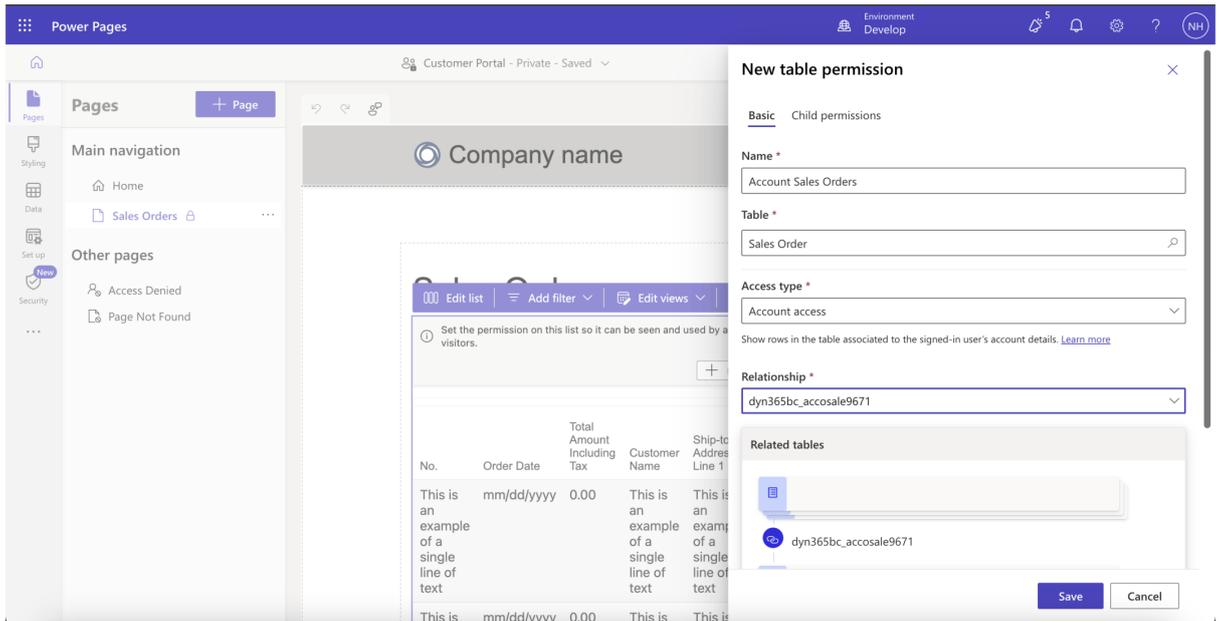
40. I clicked the Finish button



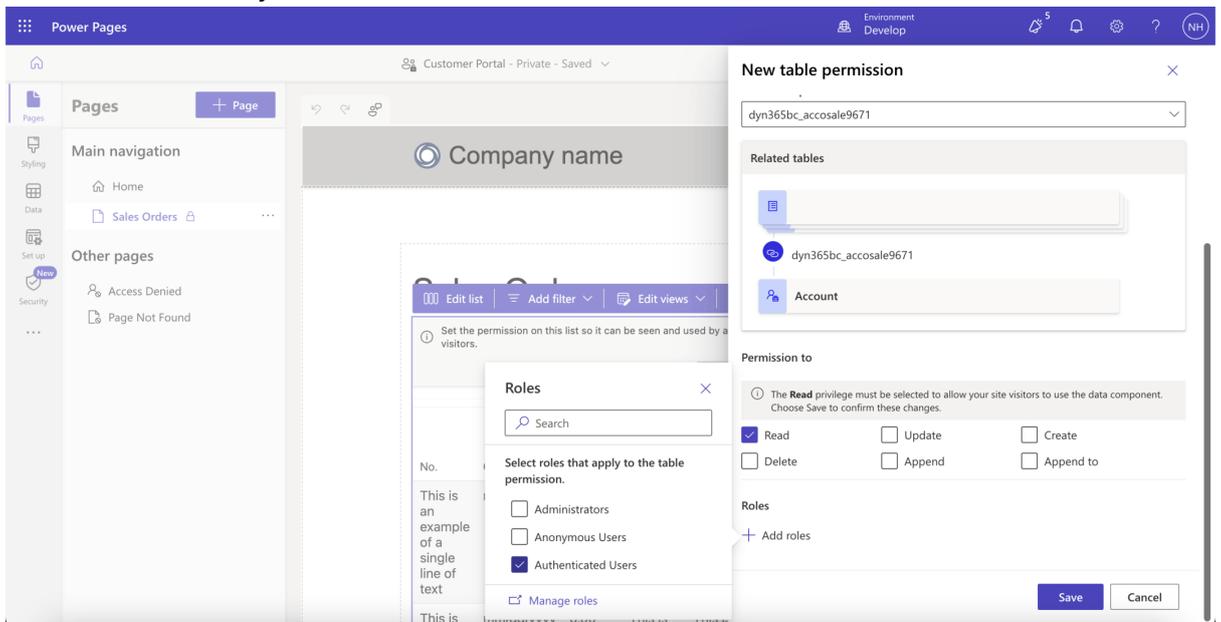
41. I clicked Refresh to view the new Synthetic Relation



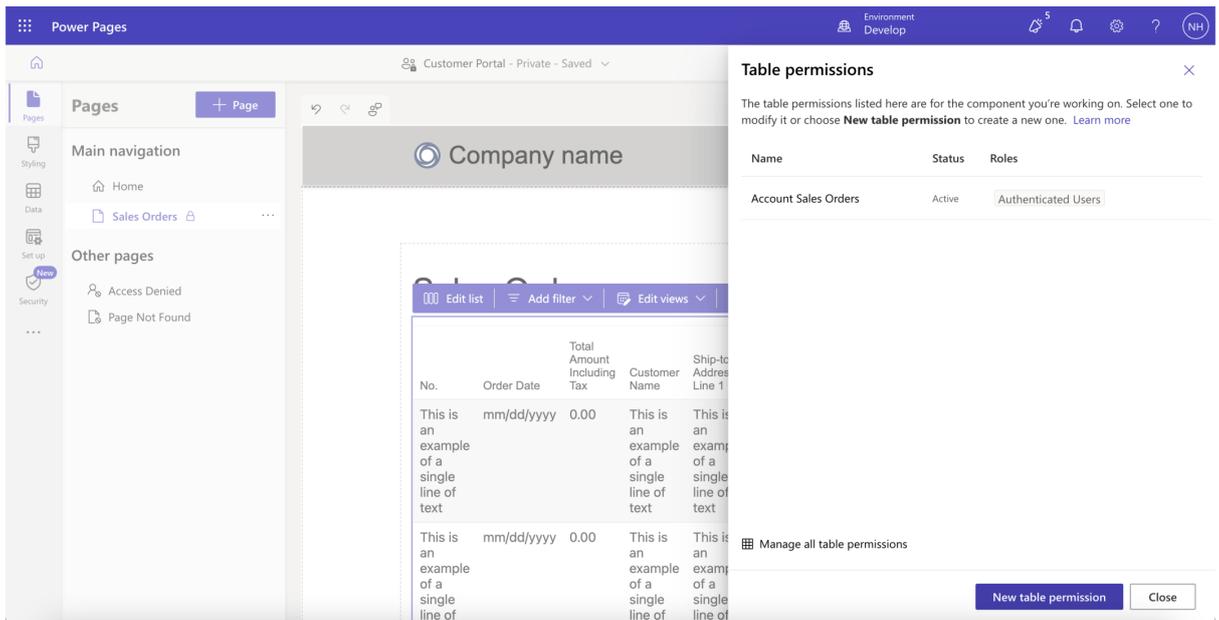
42. I updated the configuration of the **Power Pages Authentication External Users** Microsoft Entra Application



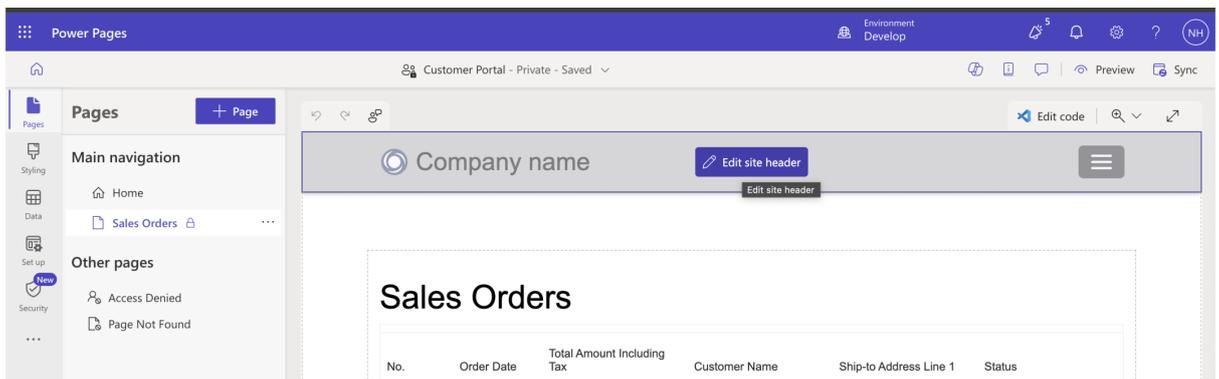
43. I selected the new Synthetic Relation



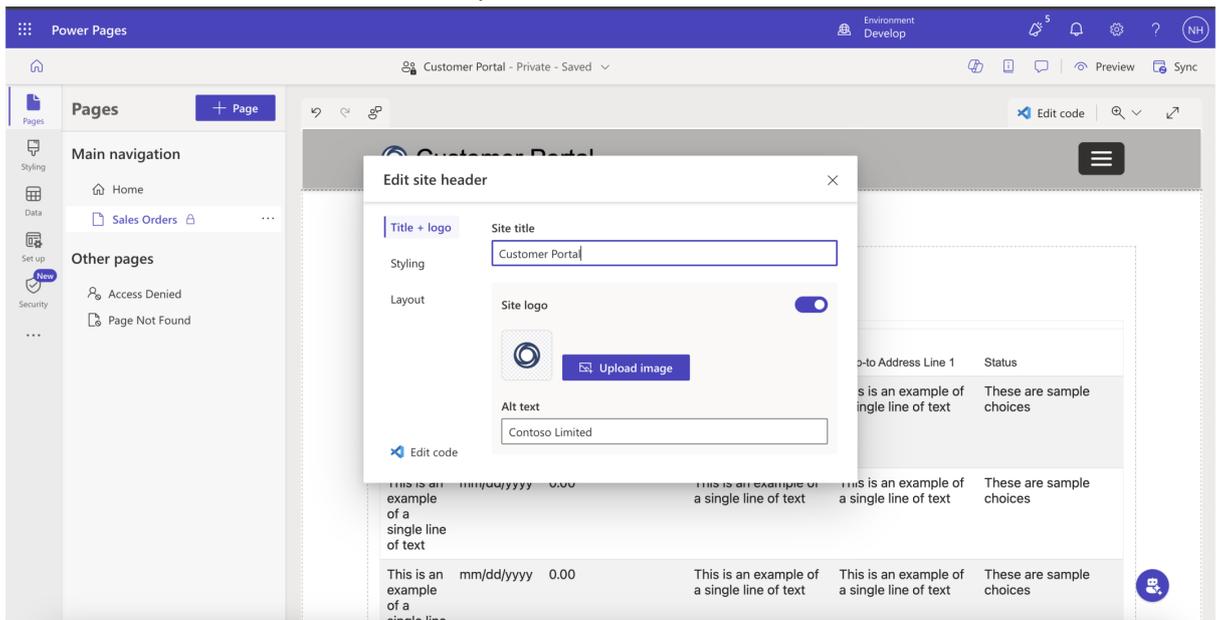
44. I added the **Authenticated Users Role**



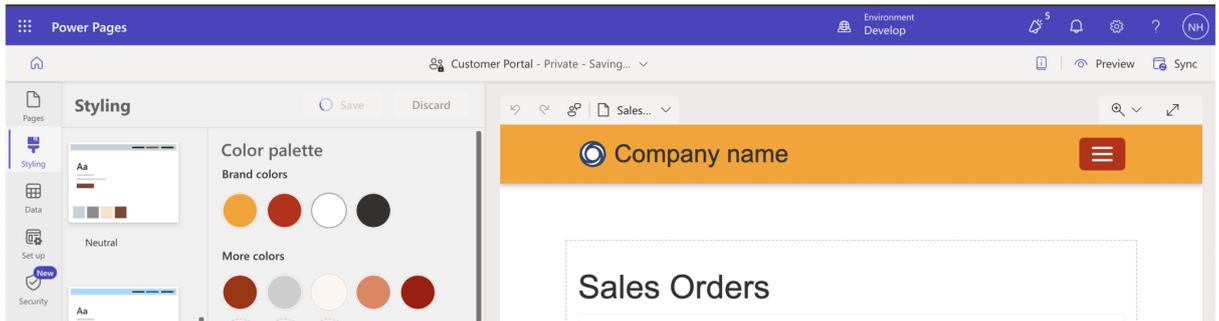
45. I clicked the Close button



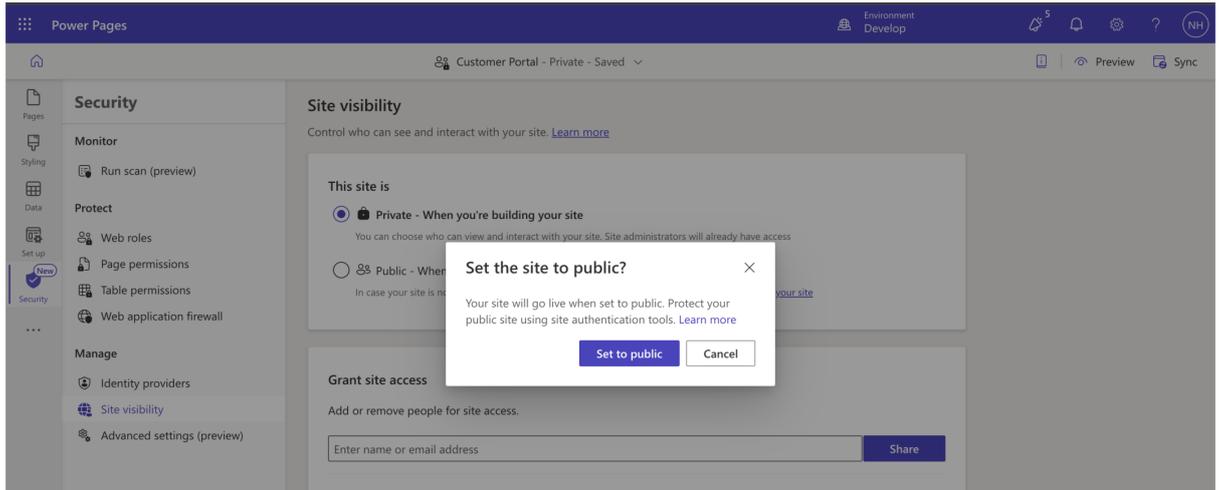
46. I used the Edit site header button to update the site title



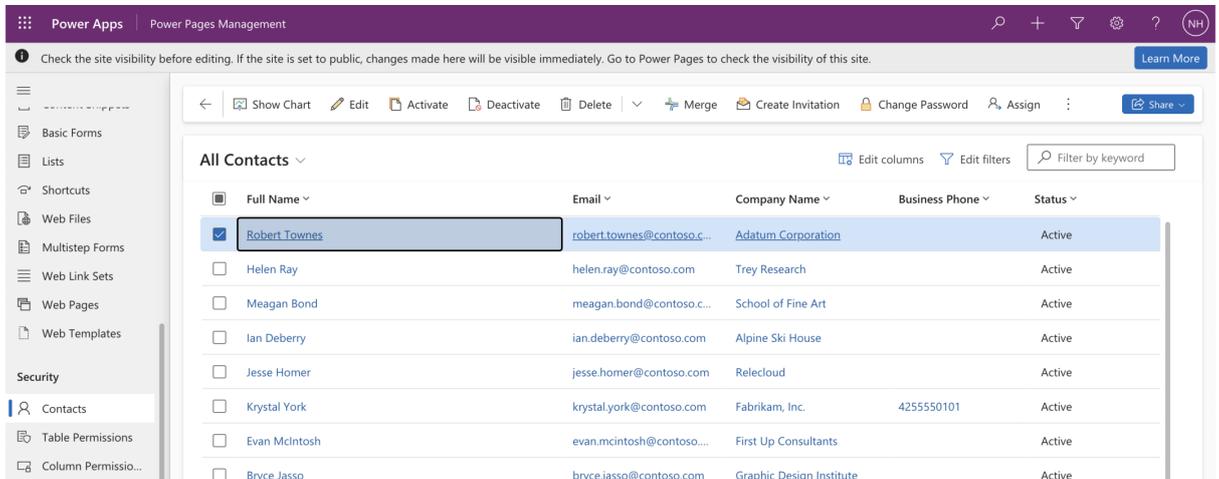
47. I set the site title to Customer Portal



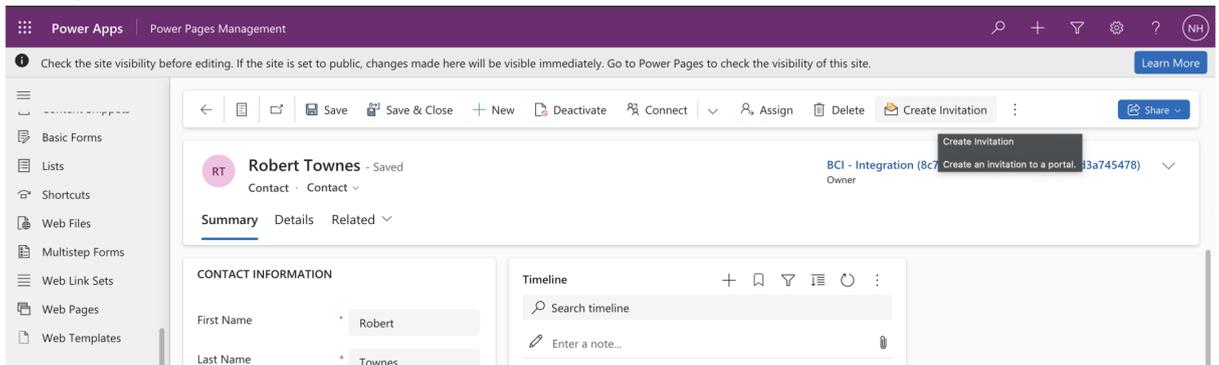
48. I updated the site Style



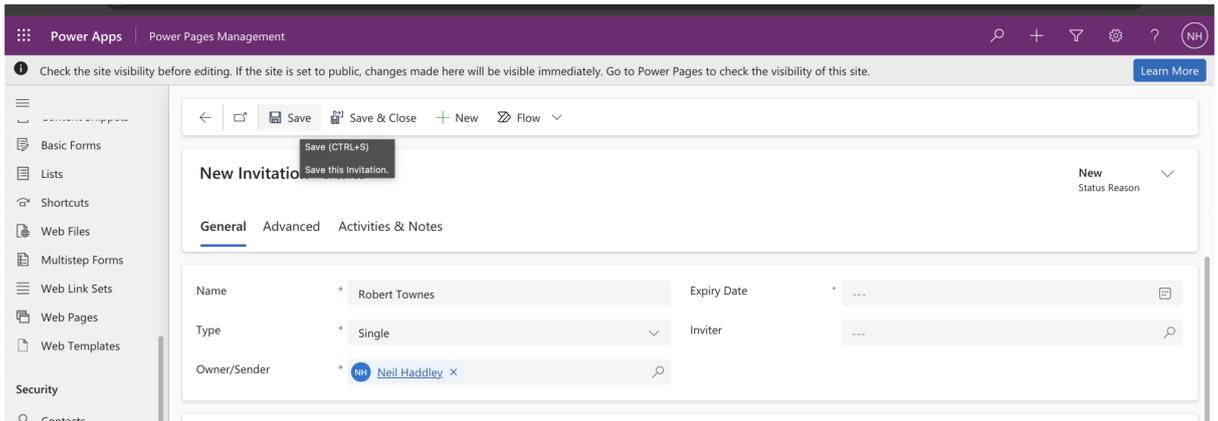
49. I set the site visibility to Public



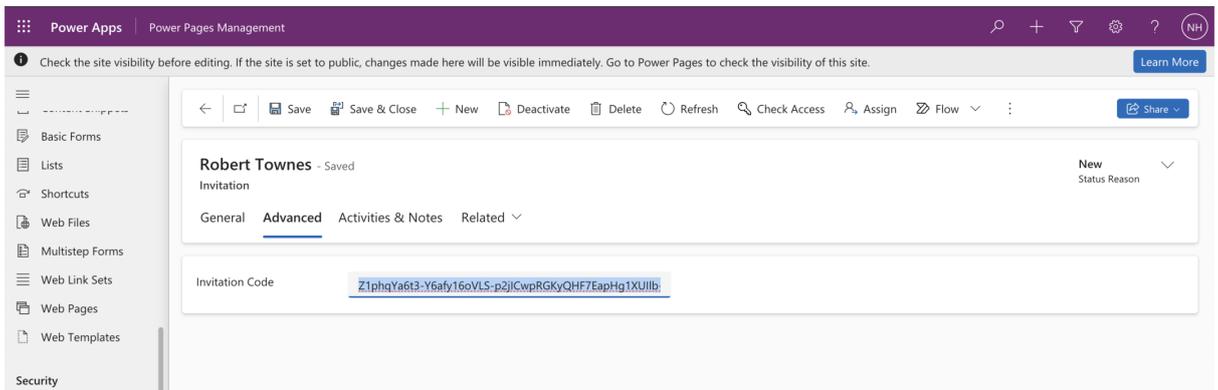
50. I navigated to the Robert Townes Contact record



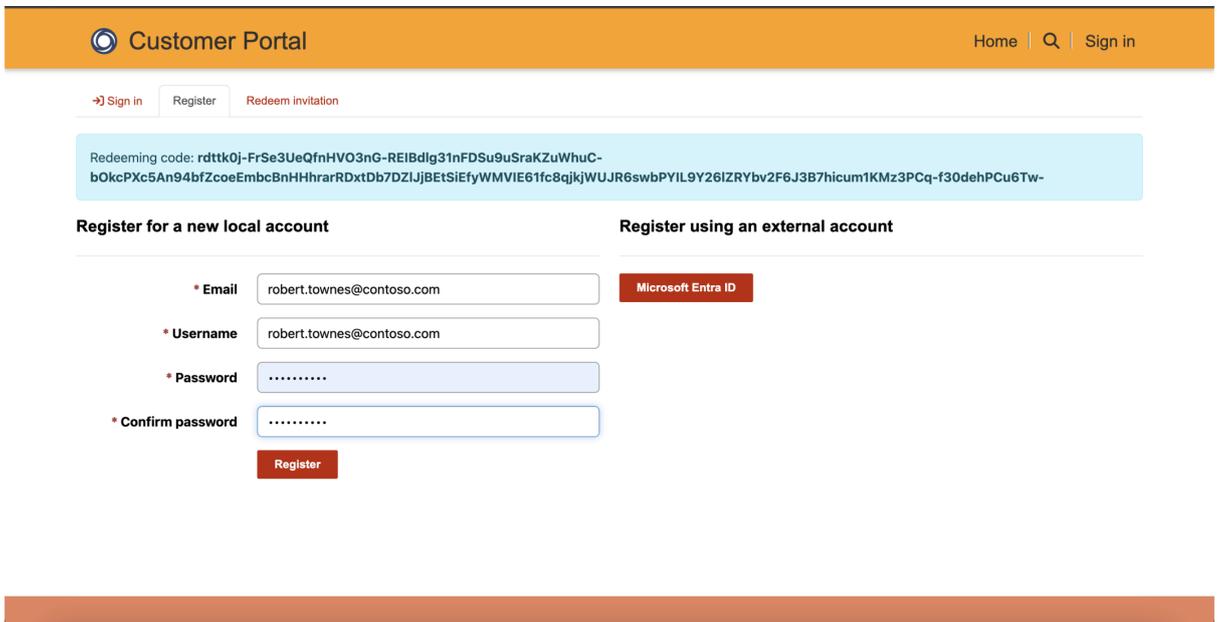
51. I clicked the **Create Invitation** button



52. I clicked Save



53. I copied the Invitation Code



54. I use the invitation code to register robert

Customer Portal Home Sales Orders Robert Townes

Home / Profile

Profile



Robert Townes

Profile

Security

- Change password
- Change email
- Manage external authentication

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.

The **Email Address** and **Phone** number will not be displayed on the site.

Your **Organization** and **Title** are optional. They will be displayed with your comments and forum posts.

Your email requires confirmation. [Confirm Email](#)

Your information

First Name *	<input type="text" value="Robert"/>	Last Name *	<input type="text" value="Townes"/>
E-mail	<input type="text"/>	Business Phone	<input type="text"/>

https://haddleycustomerportal.powerappsportals.com/Sales-Orders/

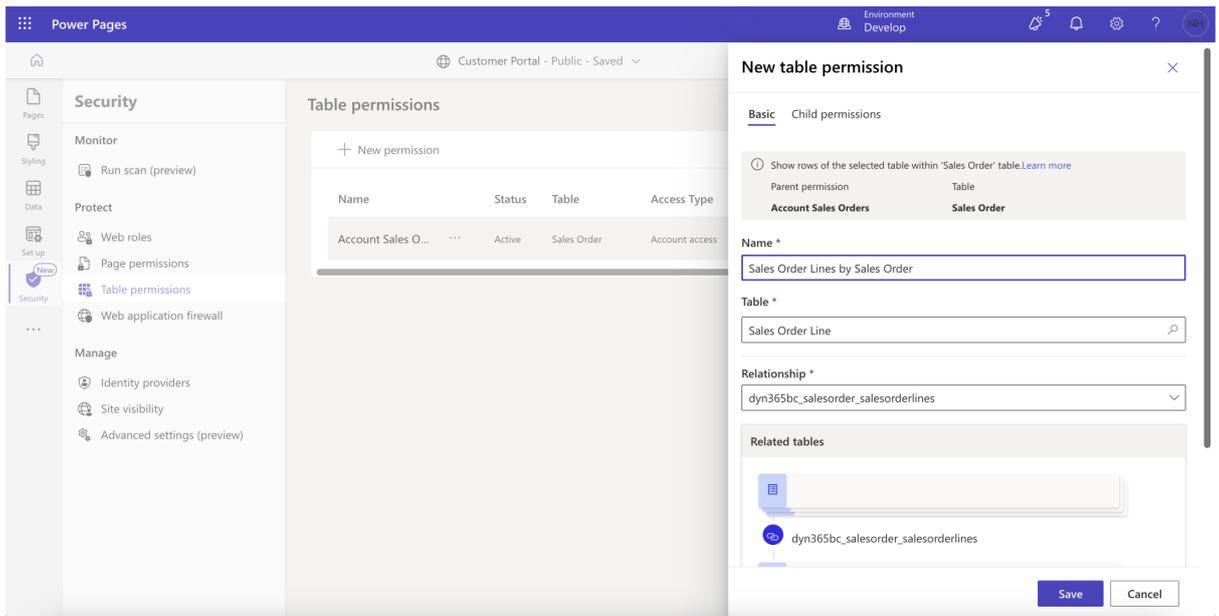
55. I clicked the Sales Orders menu item

Customer Portal Home Sales Orders Robert Townes

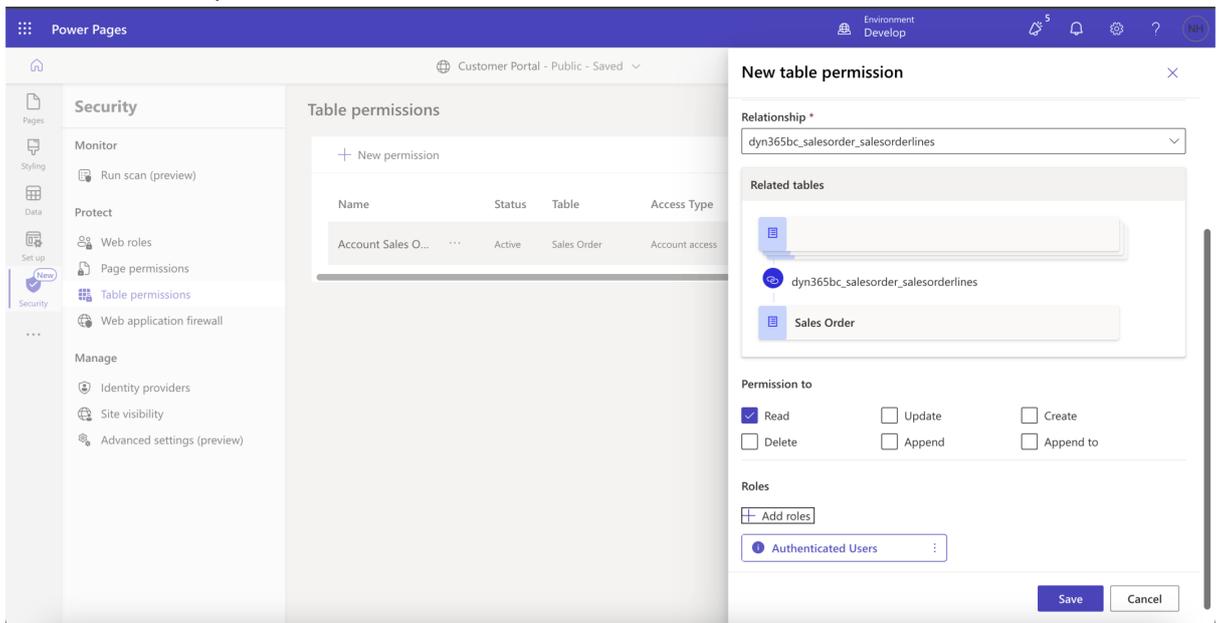
Sales Orders

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

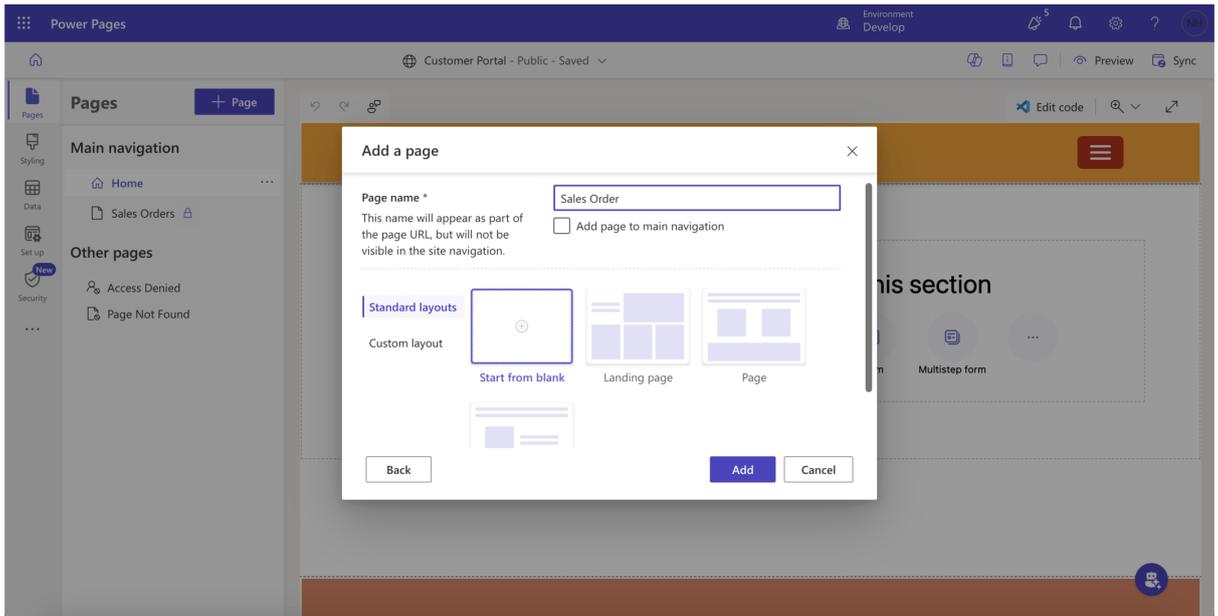
56. I reviewed the Adatum Corporation Sales Orders



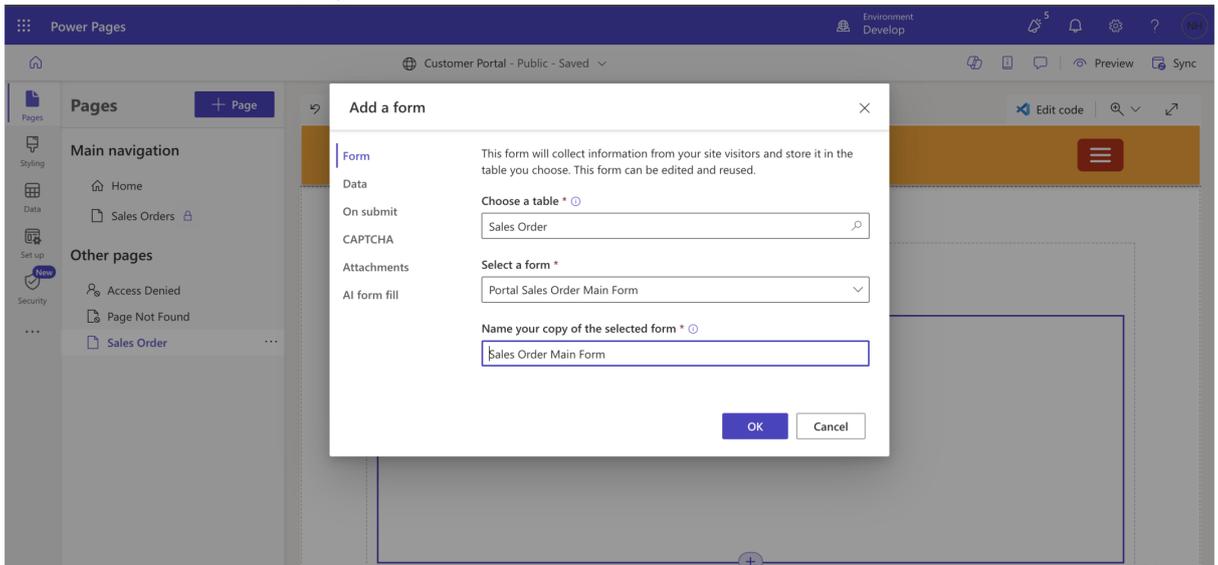
57. I created a child permission



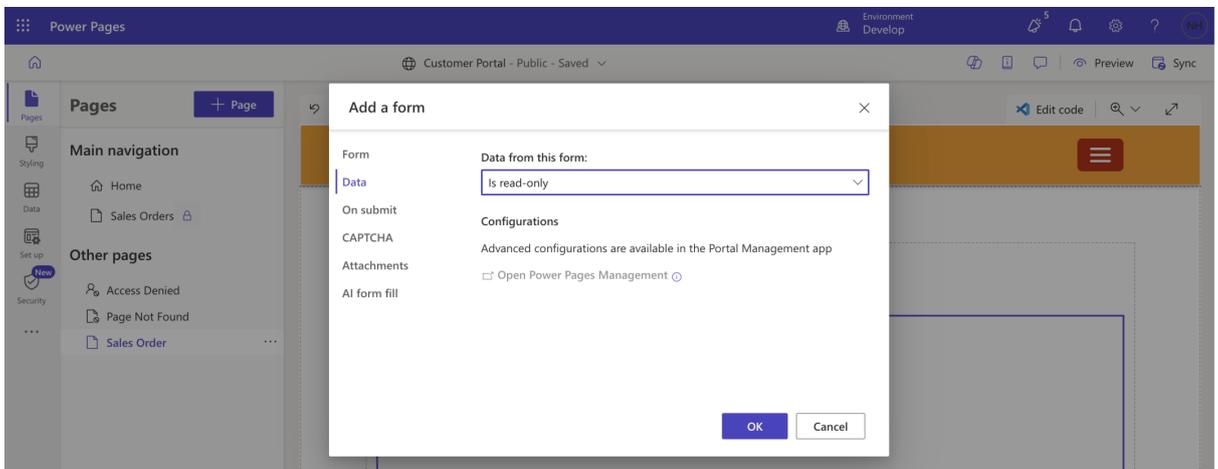
58. I selected the Authenticated Users role



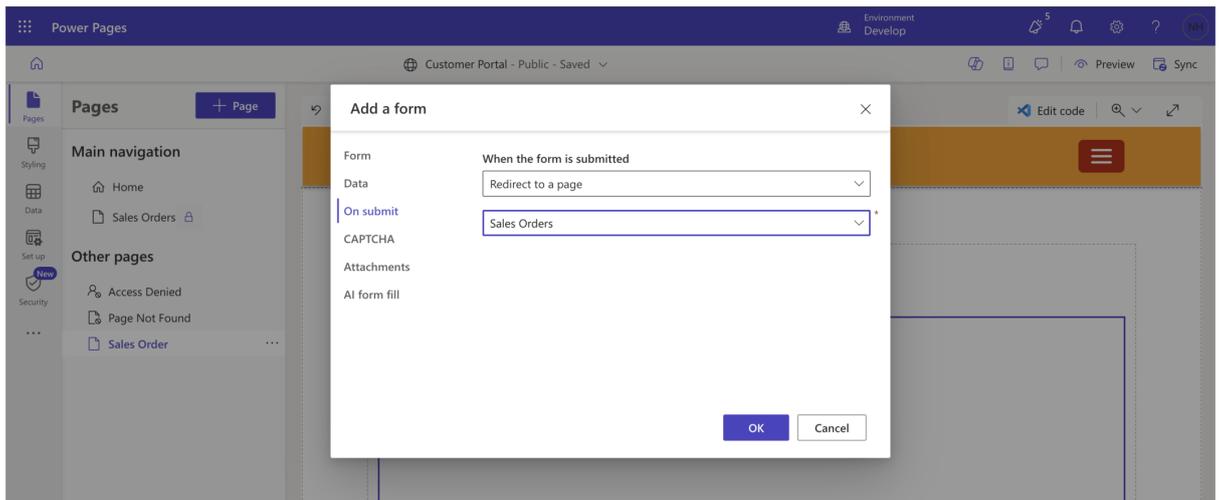
59. I created a Sales Order page



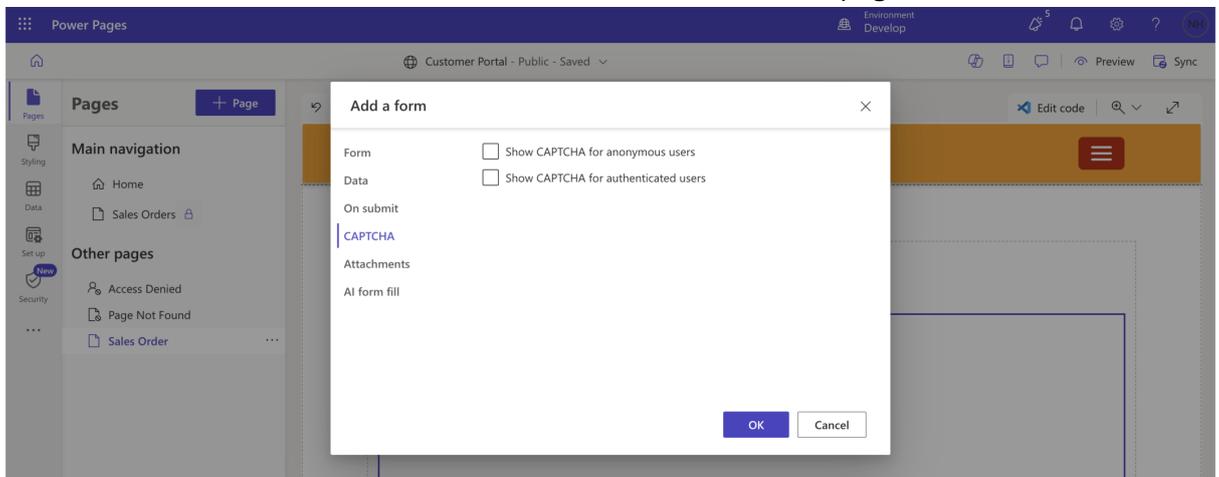
60. I added a text component and a form to the web site. I selected the **Portal Sales Order Main Form**



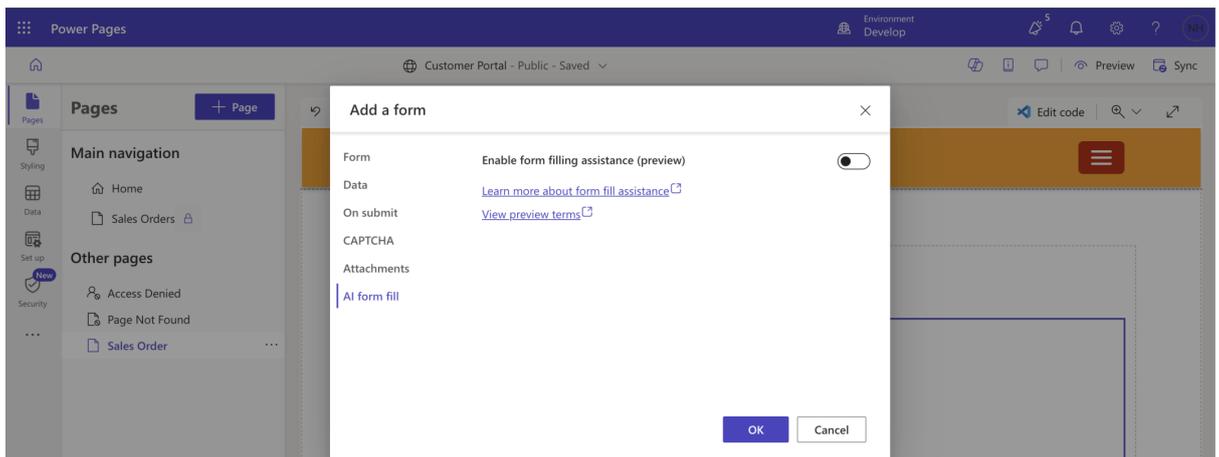
61. The form will be read-only



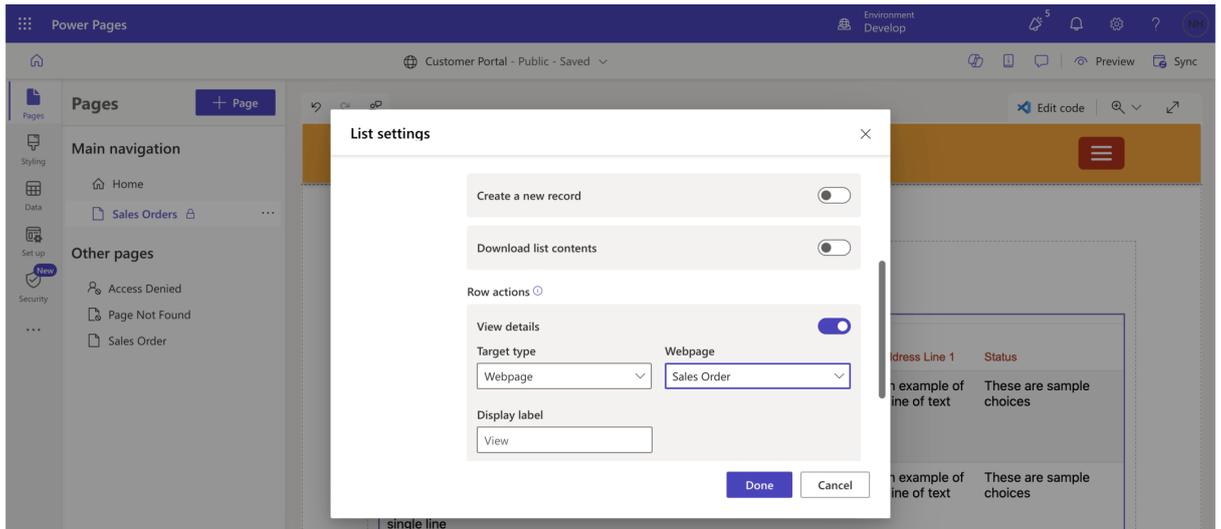
62. On submit the user will be redirected back to the Sales Orders list page



63. I turned off the CAPTCHA



64. I turned off AI form fill



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



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 clicked on the View details link



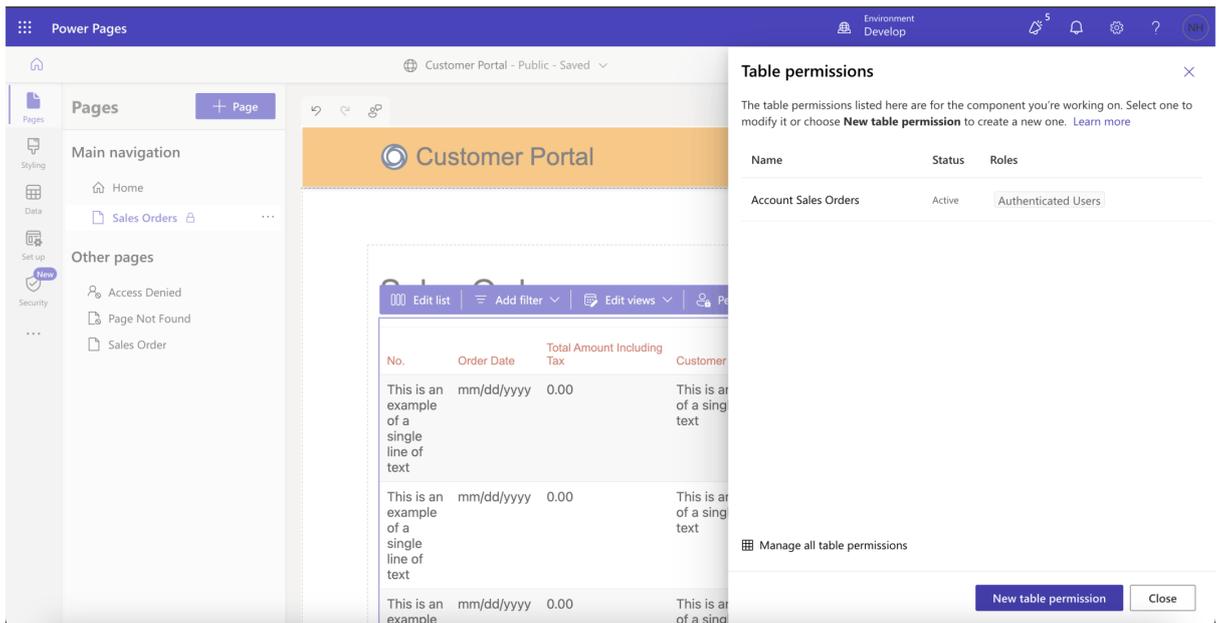
Sales Order

No.
S-ORD101001

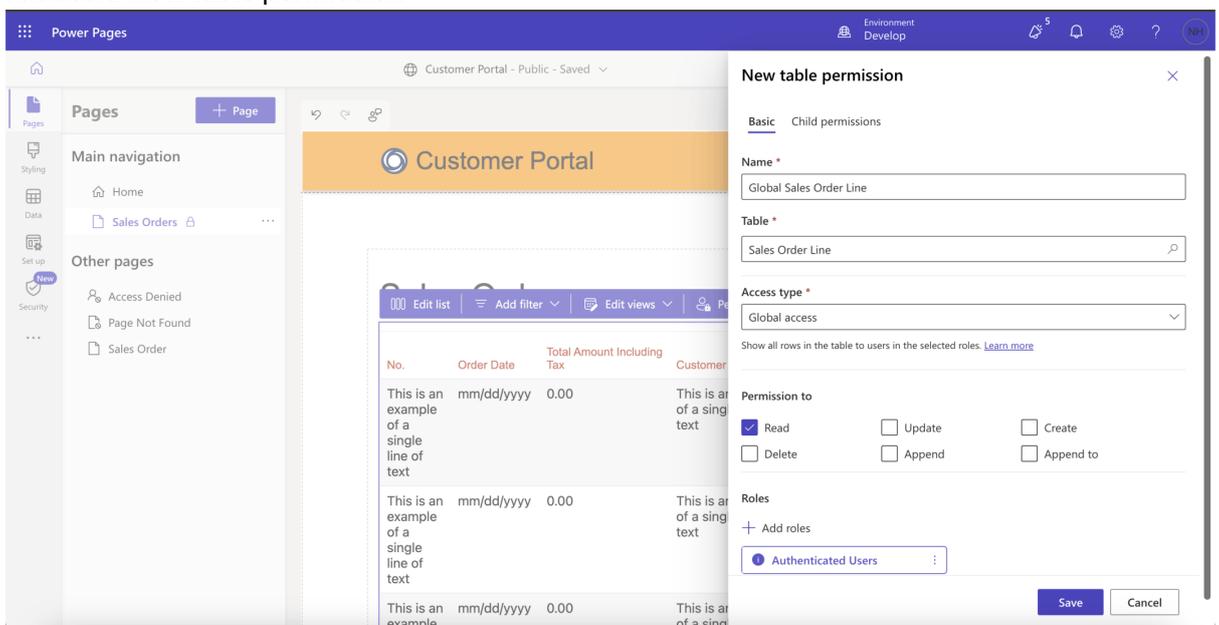
Order Date
4/2/2023

Quantity	Unit Price	Invoiced Quantity	Amount Including Tax	Shipment Date	Description	Unit Of Measure Code
Internal Server Error						

67. An Internal Server Error was generated



68. I added a New table permission



69. I added a Global permission

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

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

The screenshot shows the 'Table permissions' configuration in Power Pages. The table lists permissions for 'Sales Order Line' and 'Global Sales Order Line'.

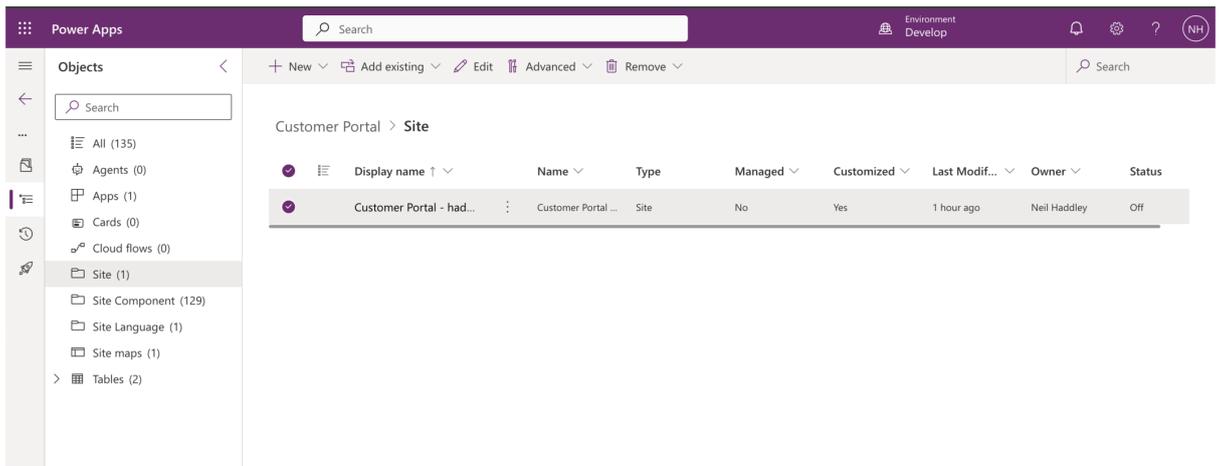
Name	Status	Table	Access Type	Roles	Relationship	Read	Update
Account Sales O...	Active	Sales Order	Account access	Authenticated Users	dyn365bc_accosale9671	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Order ...	Active	Sales Order Line	--	Authenticated Users	dyn365bc_salesorder_salesor...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Global Sales Or...	Active	Sales Order Line	Global access	Authenticated Users	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>

71. I reviewed the Table permissions

The screenshot shows the 'Objects' pane in Power Apps with a context menu open over 'Tables (2)'. The 'Table' option is highlighted.

Name	Type	Managed	Customized	Customizable	Tags
dyn365bc_saleso...	Virtual	Yes	No	Yes	Standard
dyn365bc_saleso...	Virtual	Yes	No	Yes	Standard

72. I added the Customer Portal Site to the solution



73. The Customer Portal solution is ready to be exported

Customer Order Lines

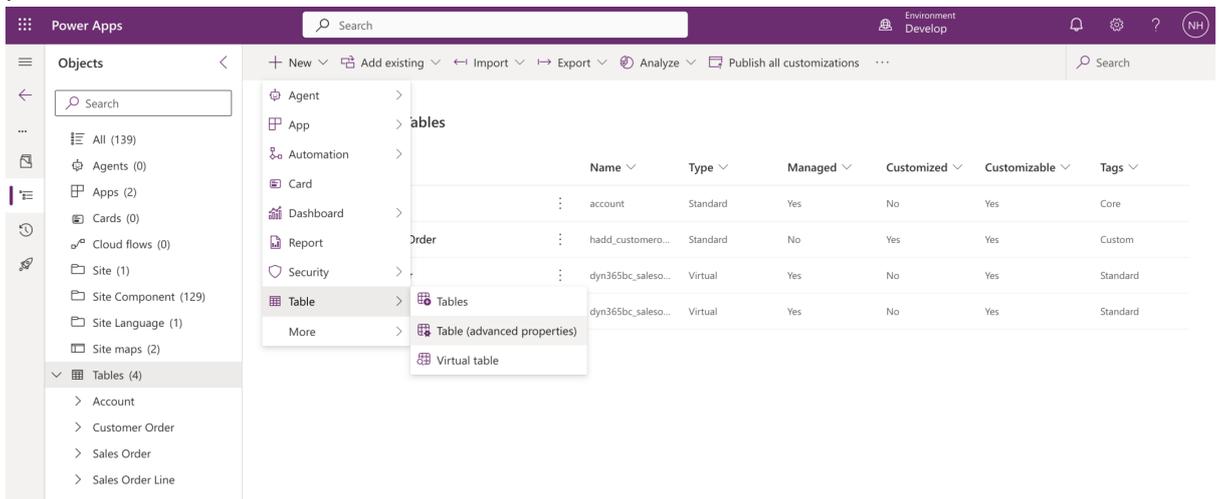
Customer Order Lines refer to the individual items or services listed within a customer's order. Each order line represents a specific product or service being purchased, including details such as:

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 price.



I created a new Table in the Solution

New table
Use tables to hold and organize your data. Previously called entities [Learn more](#)

Properties Primary column

Display name *
Customer Order Line

Plural name *
Customer Order Lines

Description

Enable attachments (including notes and files) *

Advanced options ^

Schema name *
hadd_ CustomerOrderLine

Type *
Standard

Record ownership *
I, user or team

Save **Cancel**

I named the table **Customer Order Lines**

Edit column
Previously called fields. [Learn more](#)

Display name *
Name

Description ⓘ

Data type * ⓘ
Autonumber

Required ⓘ
Business recommended

Searchable ⓘ

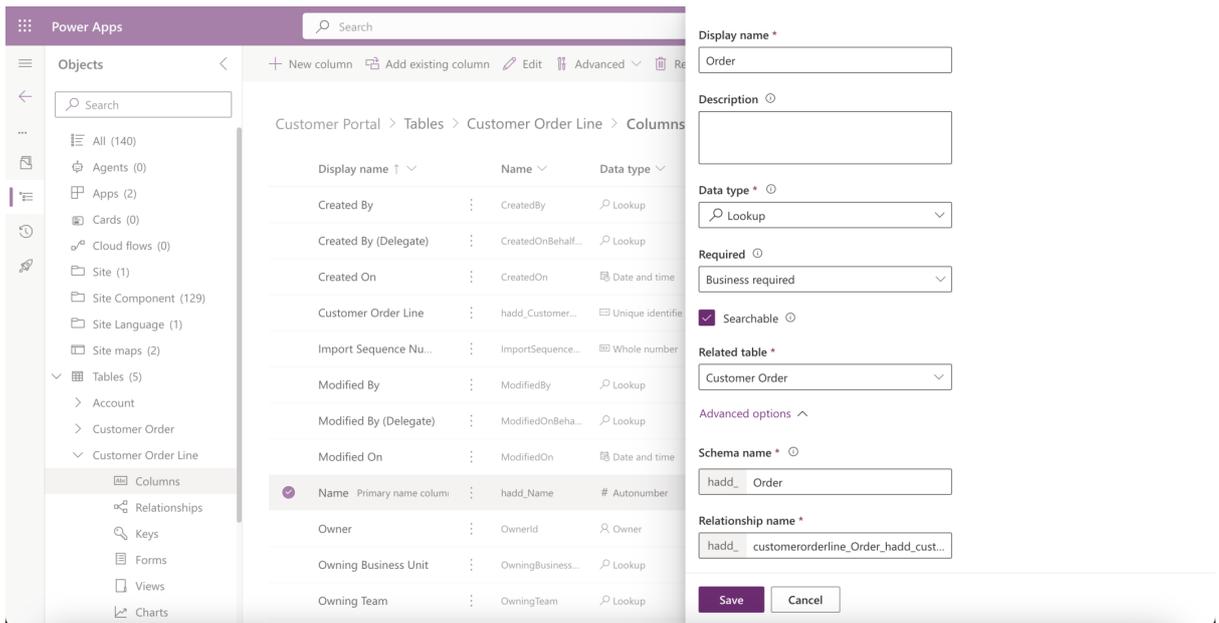
Autonumber type ⓘ
String prefixed number

Prefix
Line

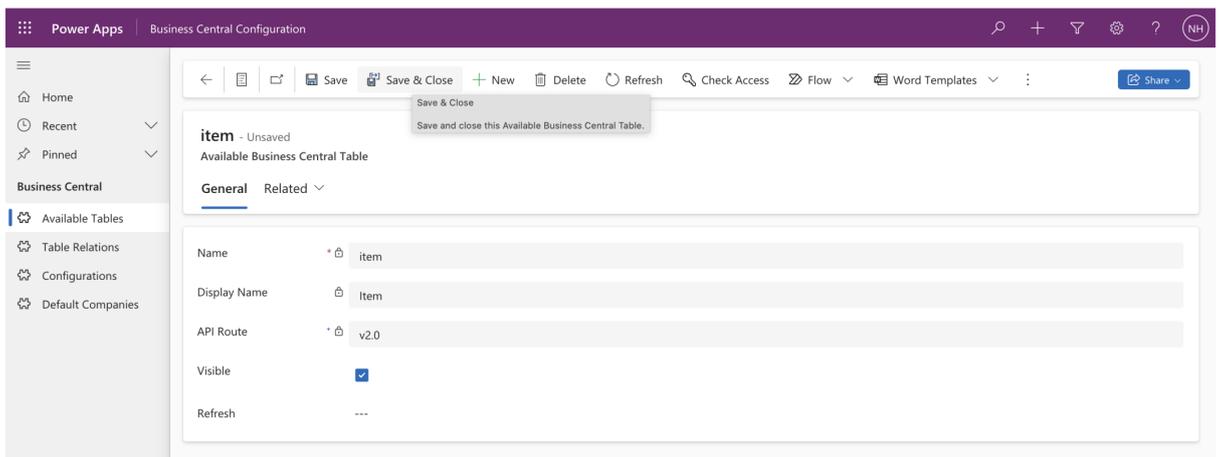
Minimum number of digits * ⓘ
6

Save **Cancel**

I updated the Customer Order Lines | Name field



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



I added the Business Central Item Virtual Table

Power Apps interface showing the configuration for a new column in the 'Customer Order Line' table. The column is named 'Item' and is of type 'Lookup'. The configuration panel on the right shows the following settings:

- Display name: Item
- Description: (empty)
- Data type: Lookup
- Required: Business required
- Searchable:
- Related table: Item
- Schema name: hadd_ Item
- Relationship name: hadd_ customerorderline_item_dyn365bc_i...

Buttons: Save, Cancel

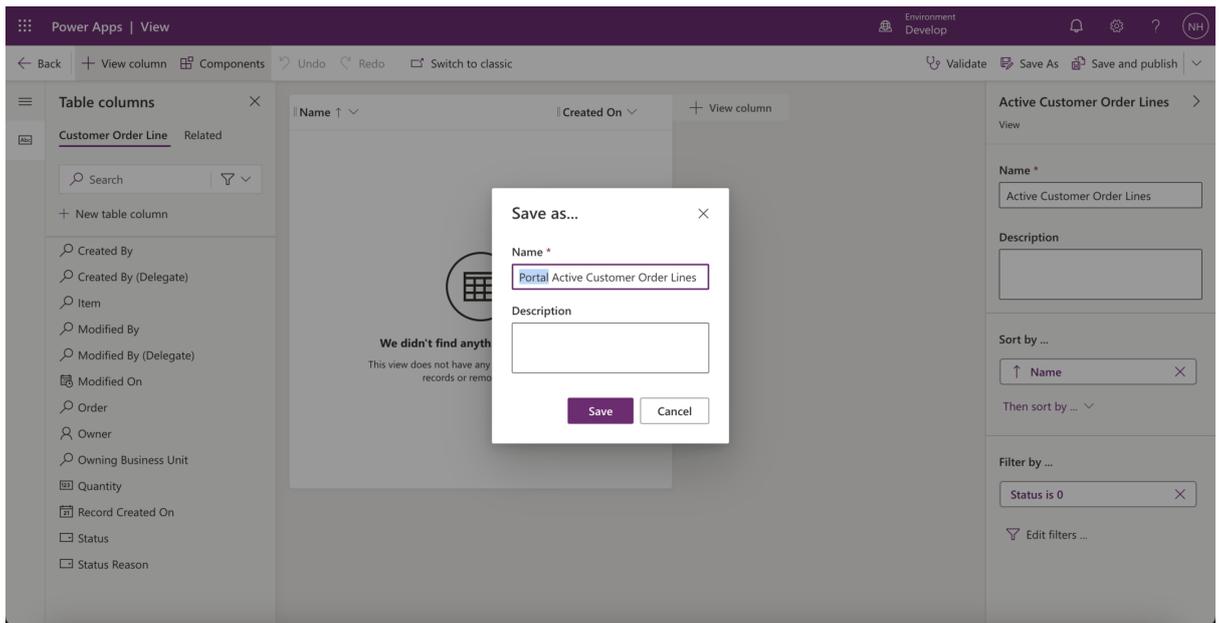
I added an **Item lookup** column to the Customer Order Lines table

Power Apps interface showing the configuration for a new column in the 'Customer Order Line' table. The column is named 'Quantity' and is of type 'Whole number'. The configuration panel on the right shows the following settings:

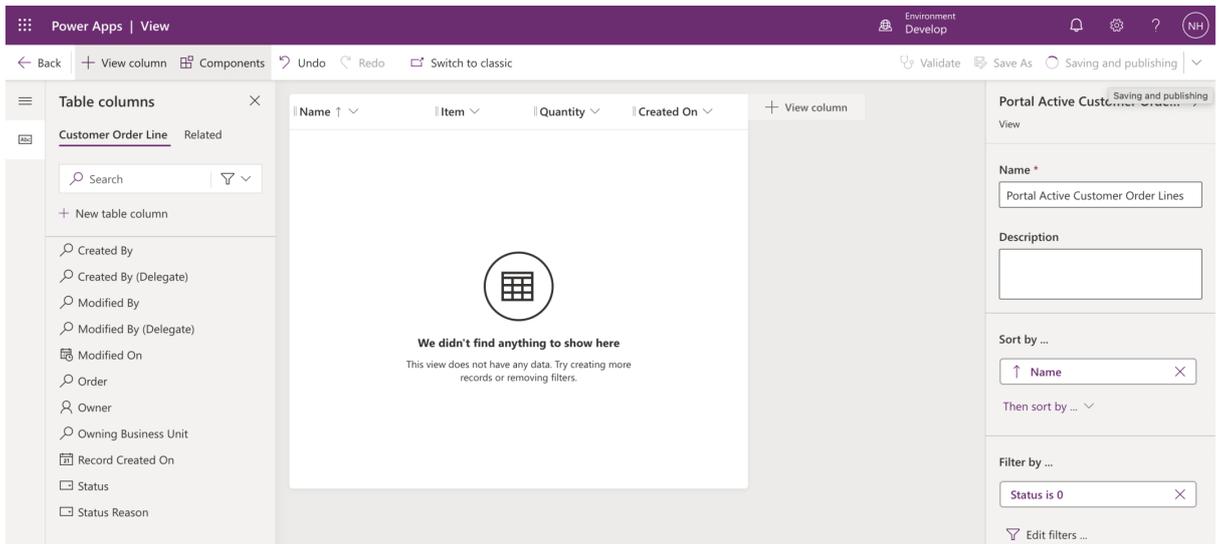
- Display name: Quantity
- Description: (empty)
- Data type: Whole number
- Format: None
- Behavior: Simple
- Required: Business required
- Searchable:
- Schema name: hadd_ Quantity

Buttons: Save, Cancel

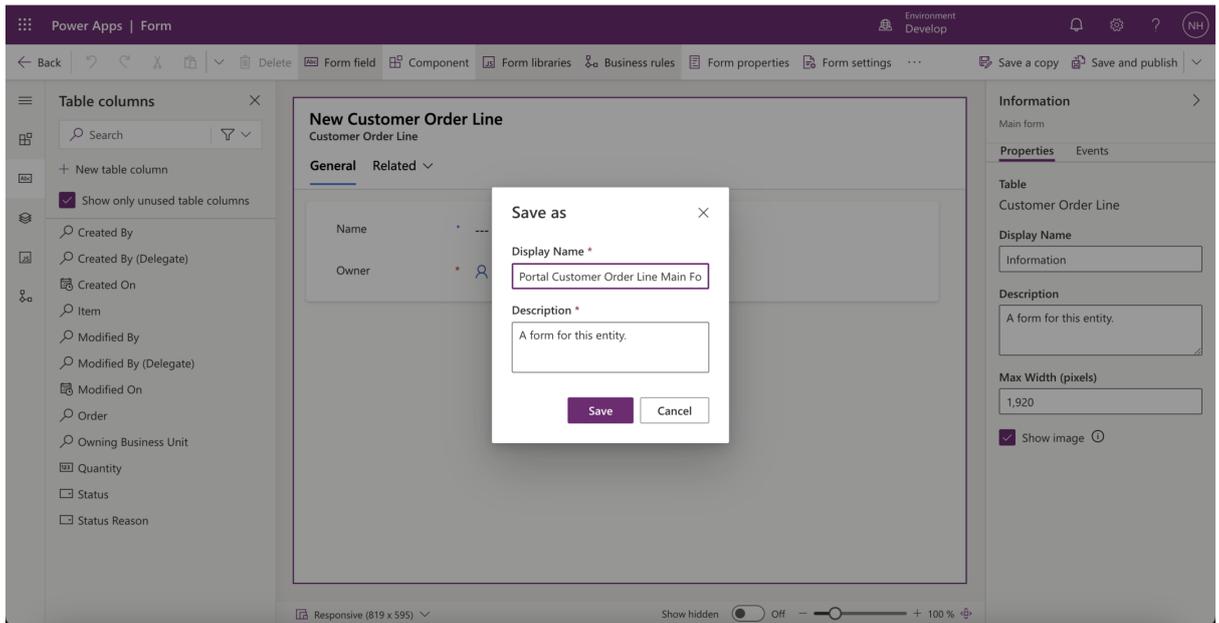
I added a Whole Number **Quantity** column



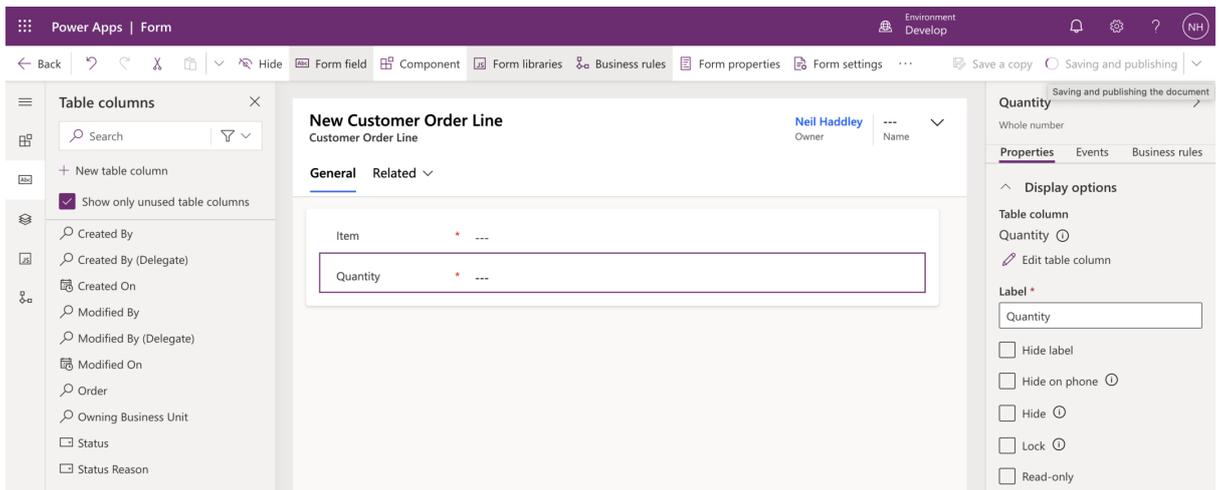
I created a view



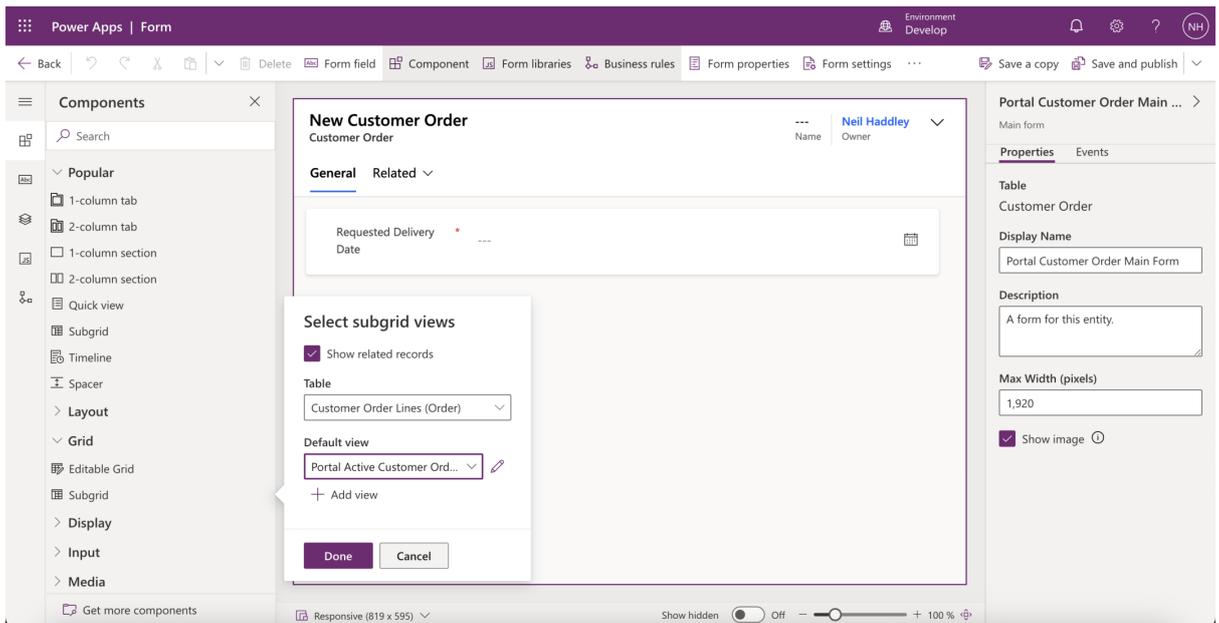
I added the Item and Quantity columns to the Portal view



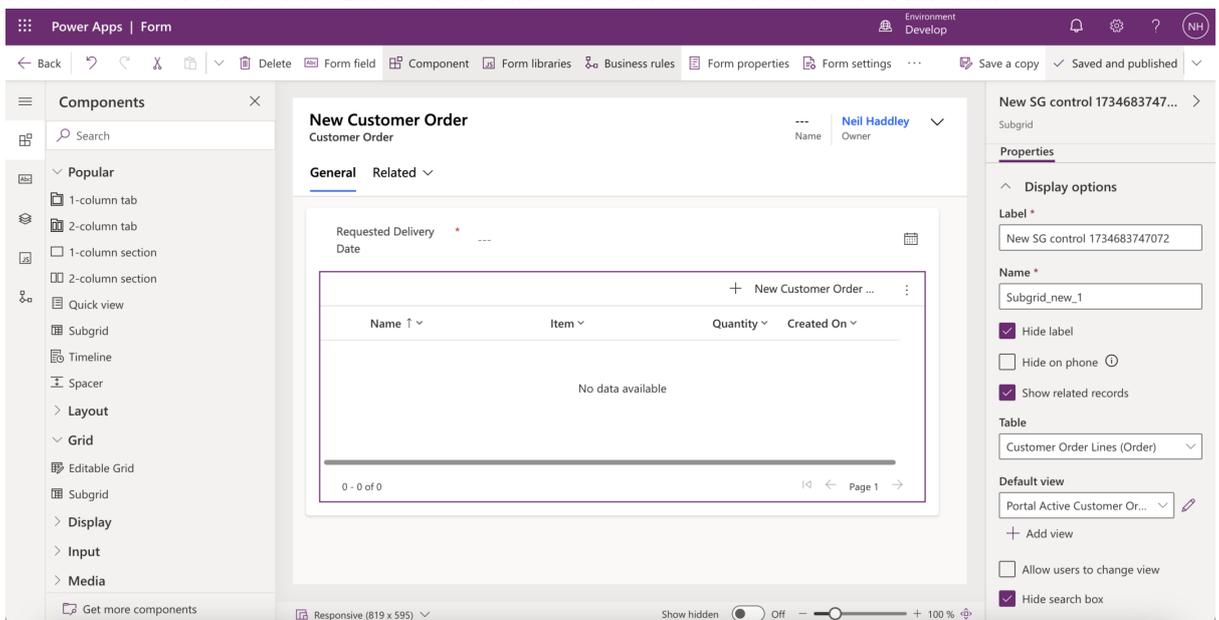
I added a form to the **Customer Order Line** table



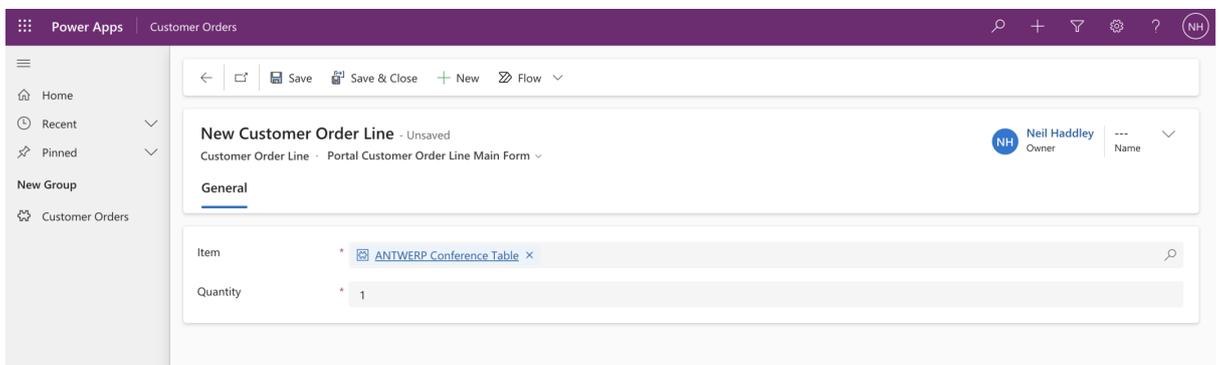
I added the **Item** and **Quantity** columns to the form



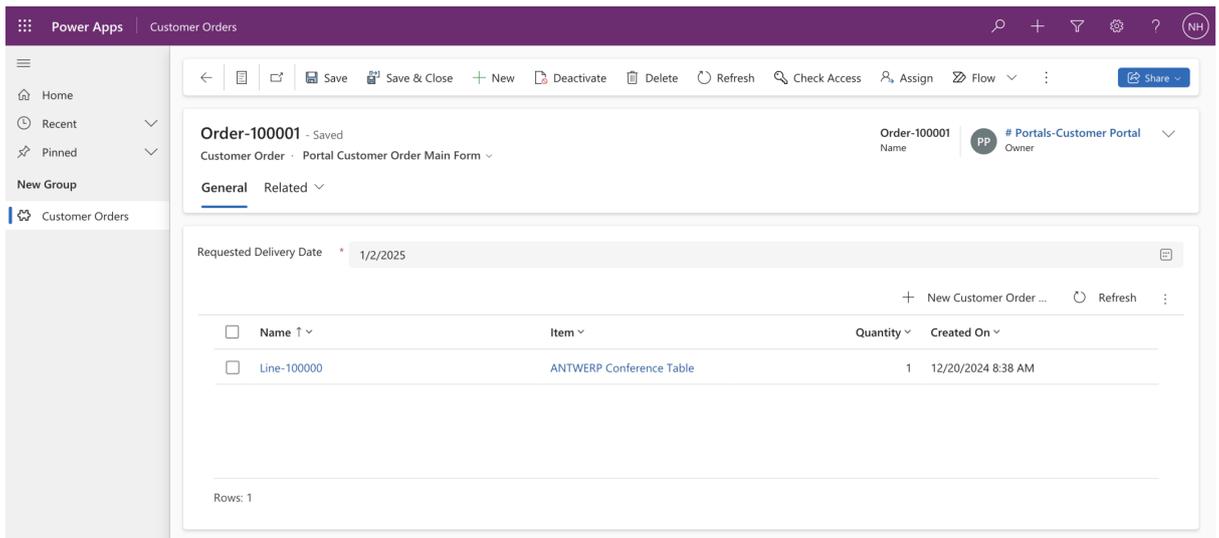
I added a Customer Order Lines Grid to the Customer Order table's Portal form



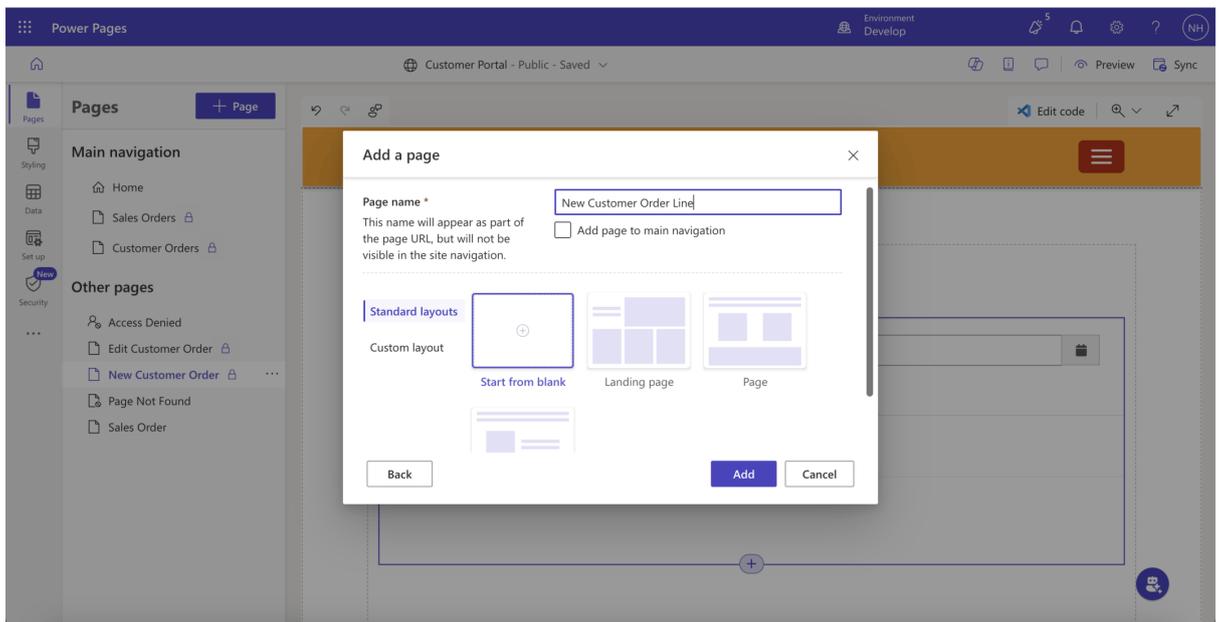
I uncheck the Hide label checkbox



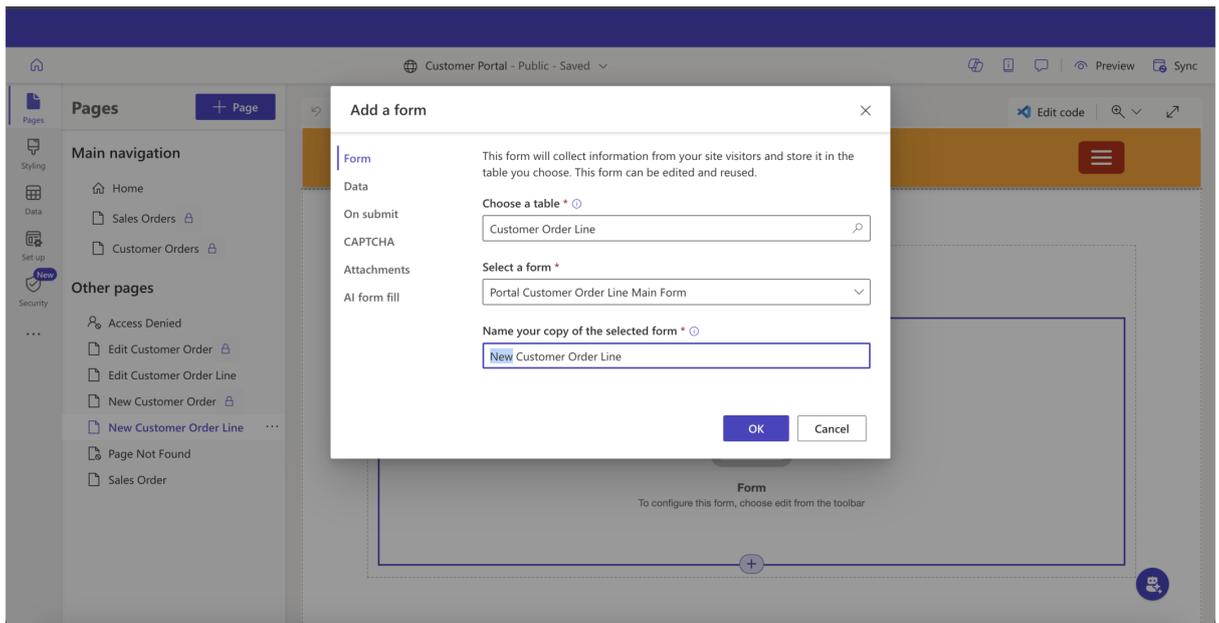
I tested the add Customer Order Line form



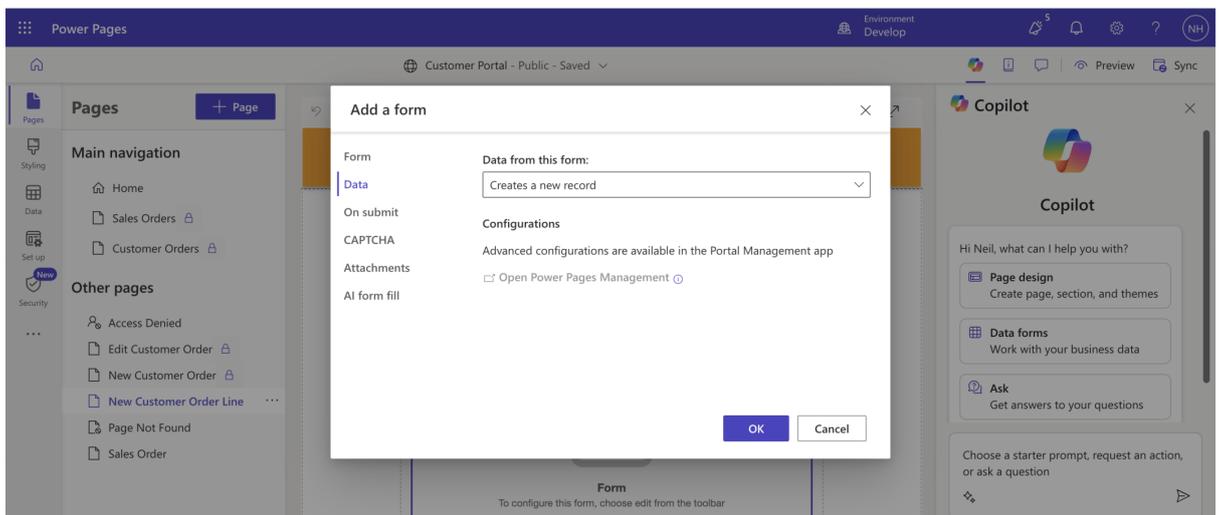
I was able to add a line to an order



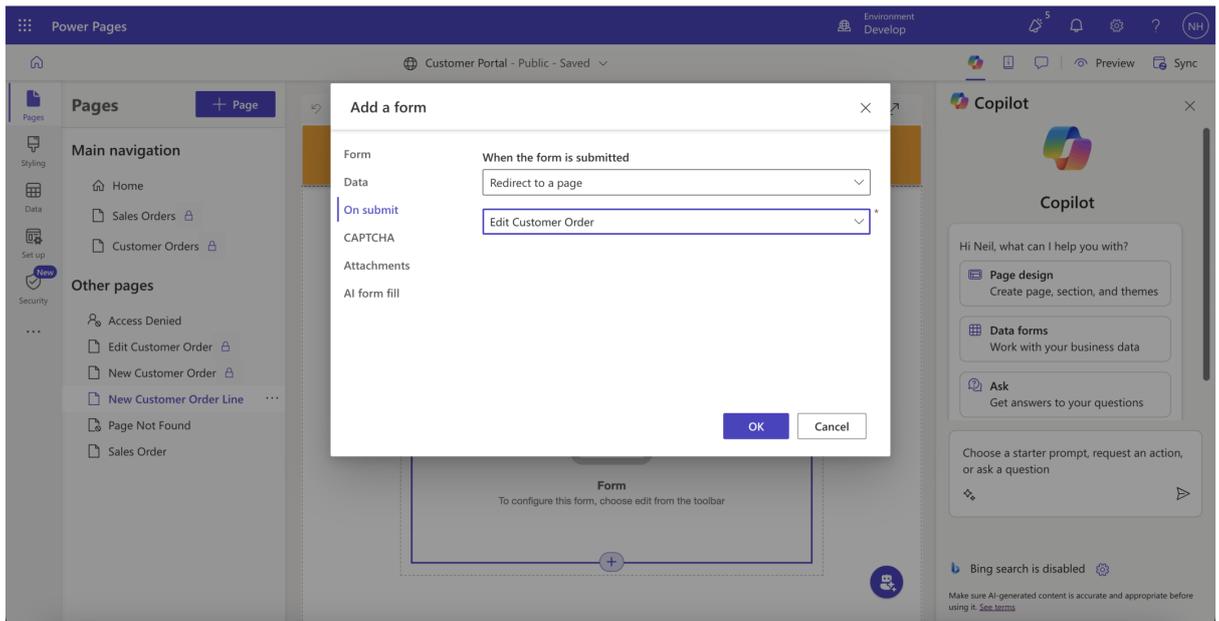
I created a **New Customer Order Line** page



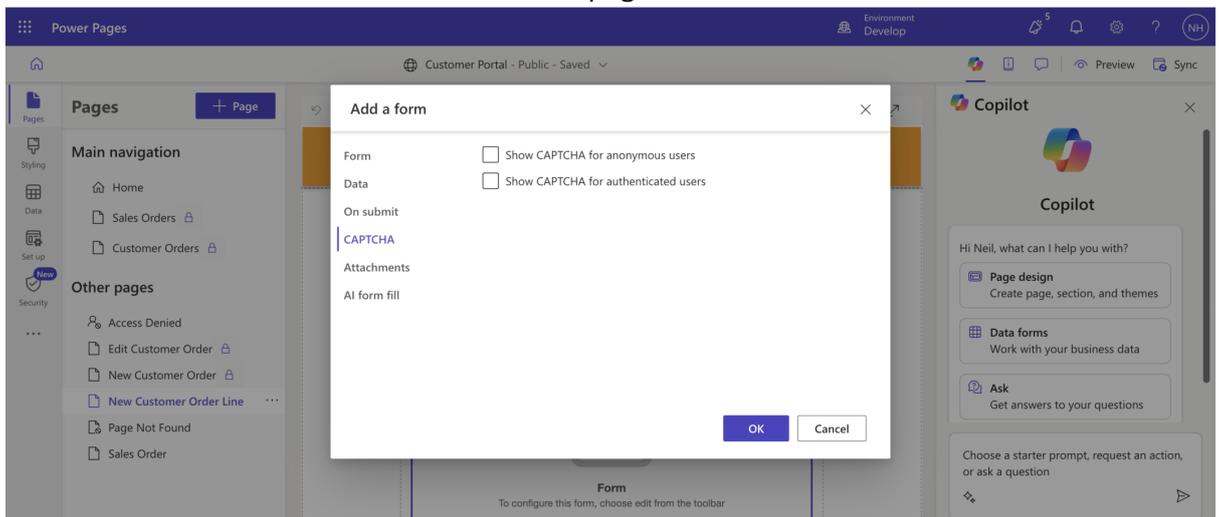
I added a New Customer Order Line Basic form



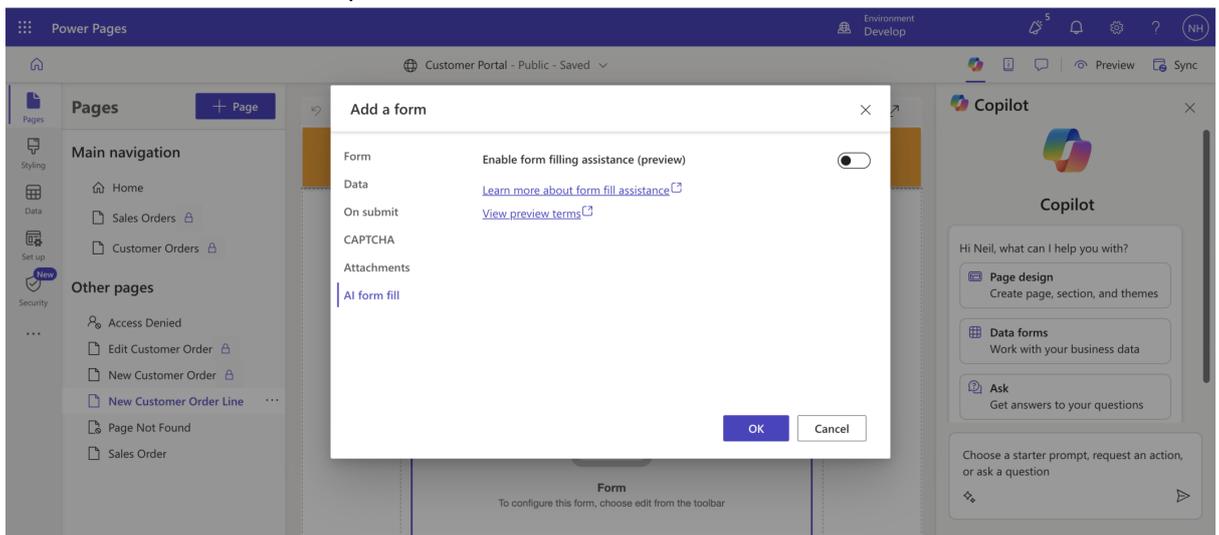
I selected the Creates a new record option



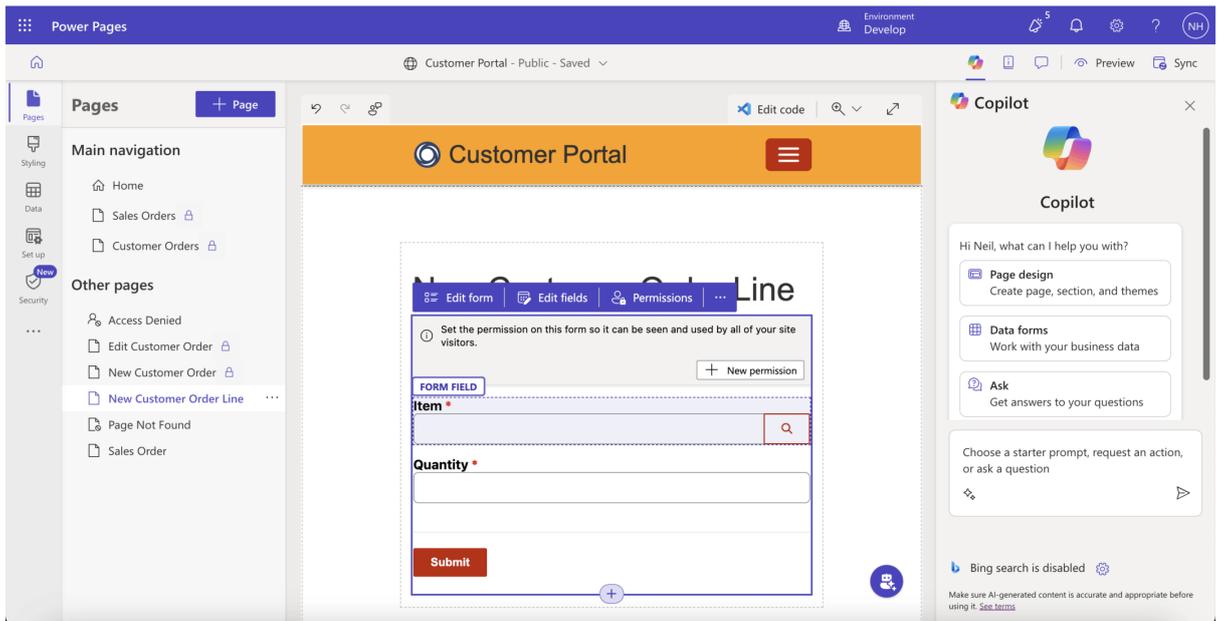
I selected redirect to the Edit Customer Order page



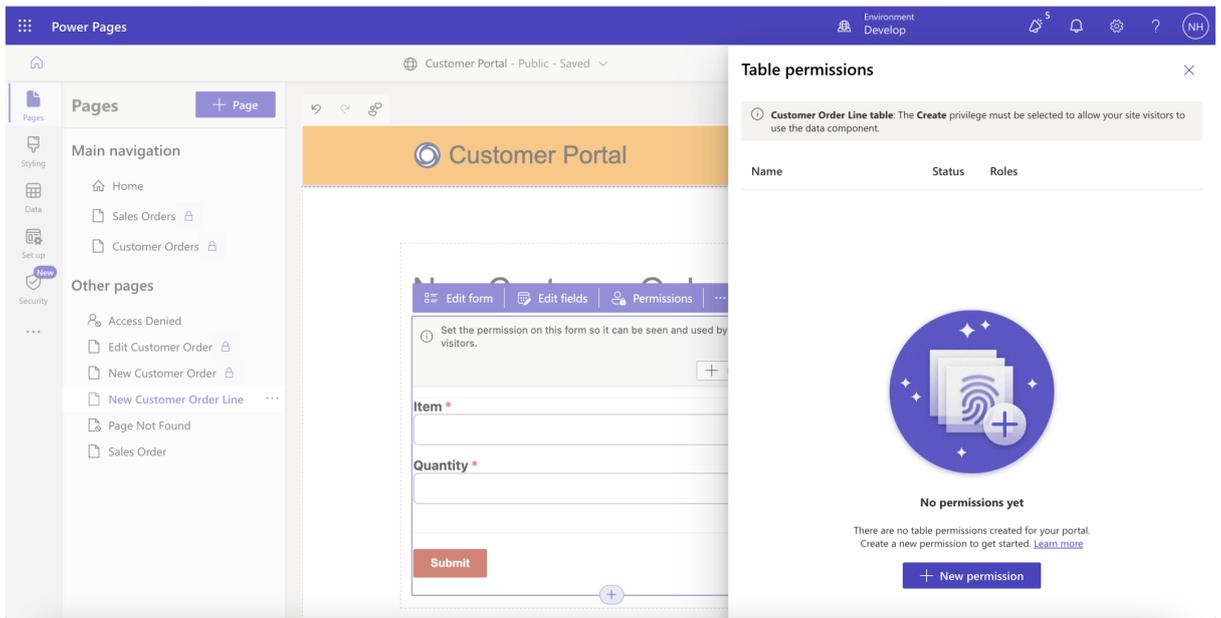
I deselected the CAPTCHA options



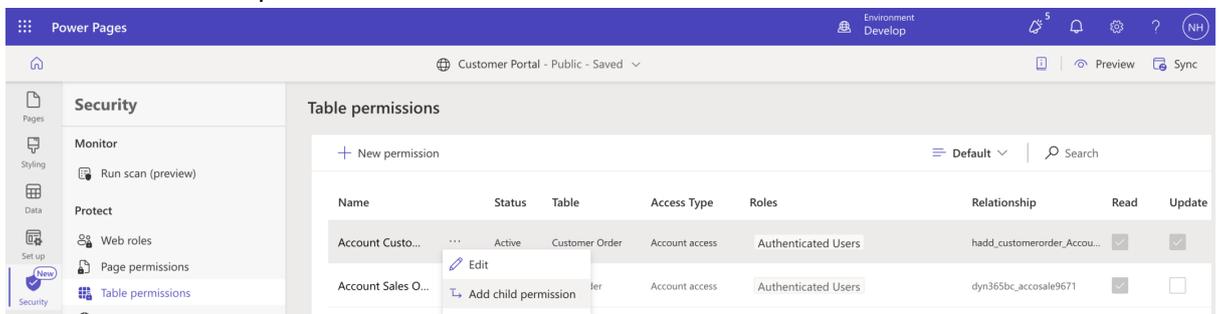
I deselected the AI form filling experience



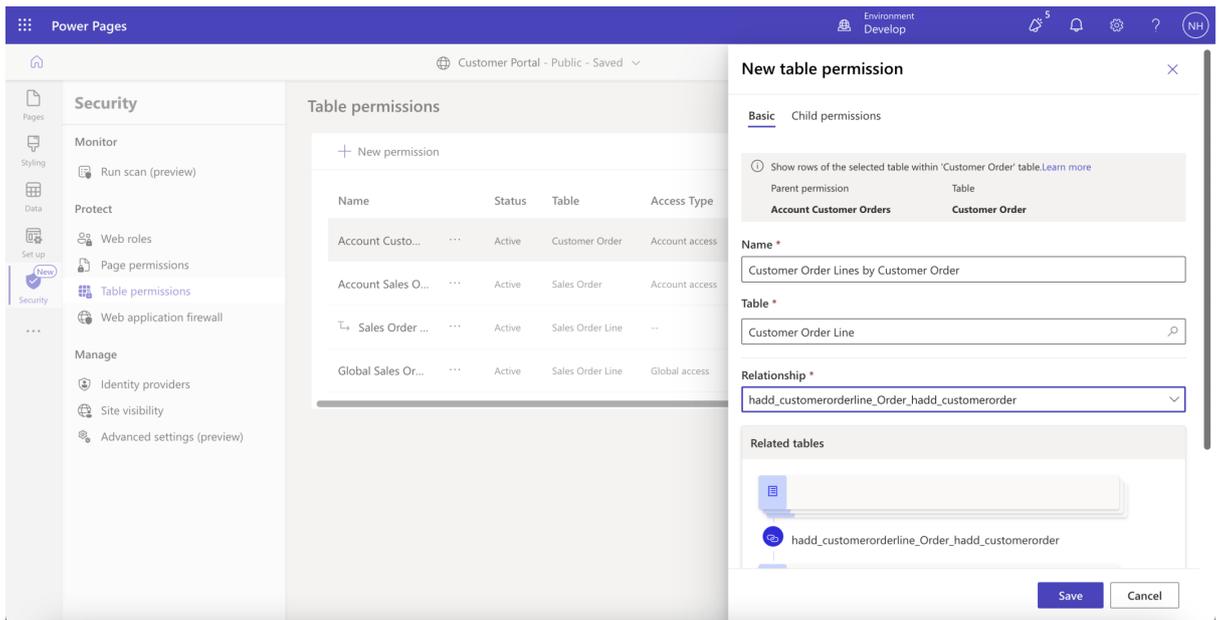
I reviewed the options



I reviewed the table permissions



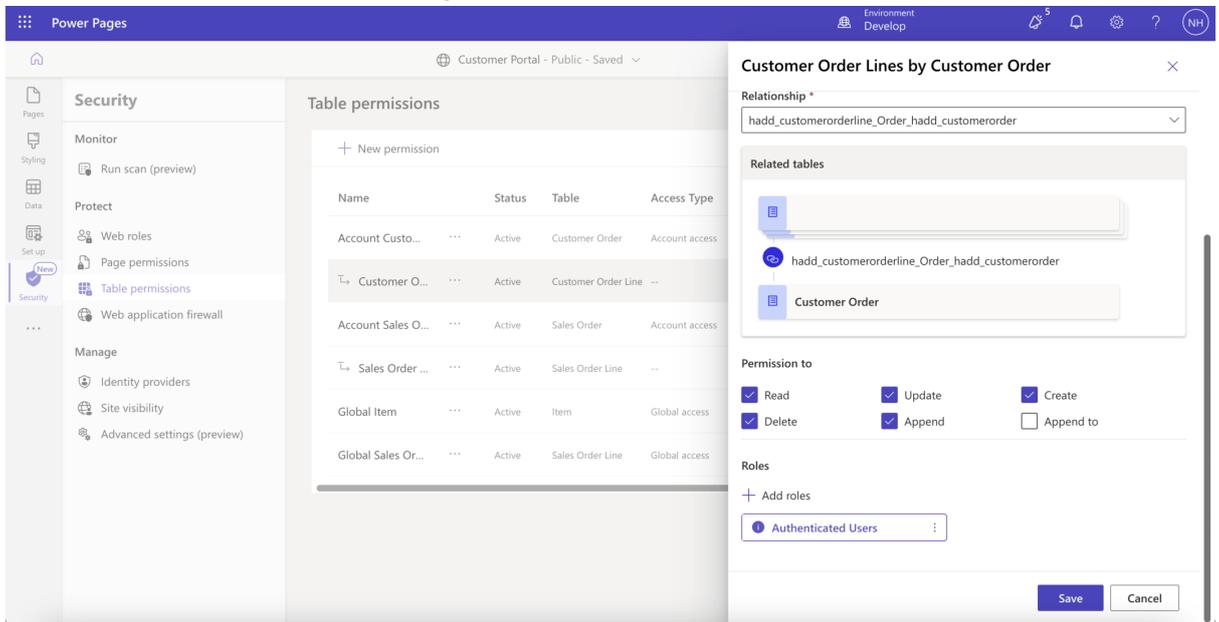
I clicked the **Add child permission** menu item



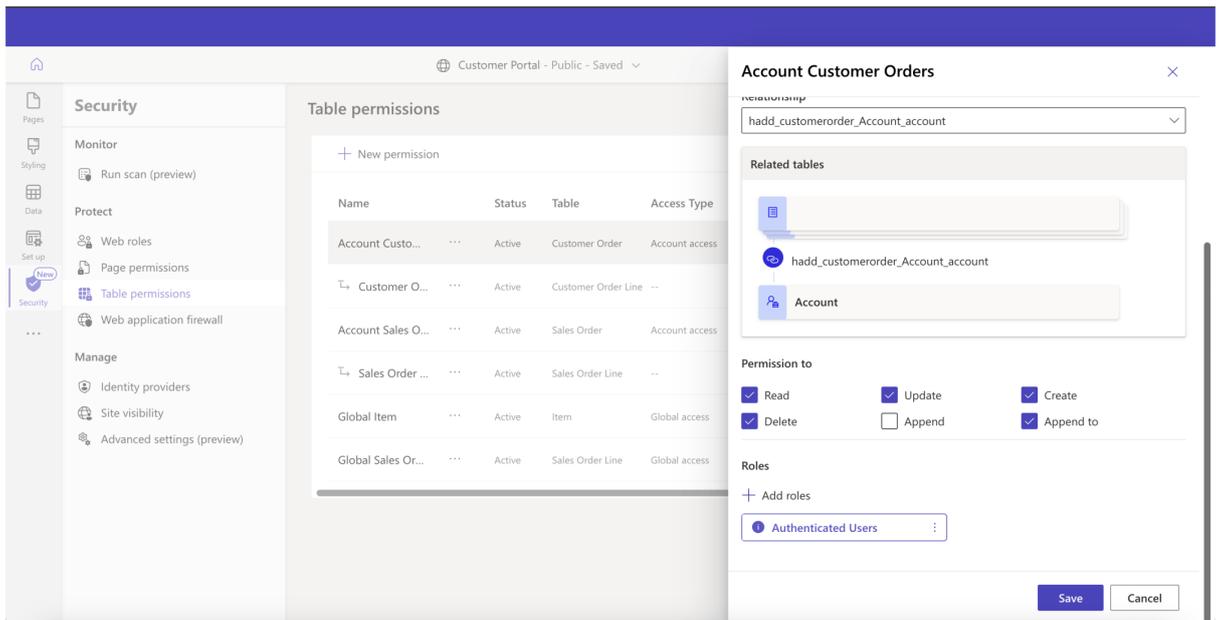
I named the child permissions entry Customer Order Lines by Customer Order.

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.

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

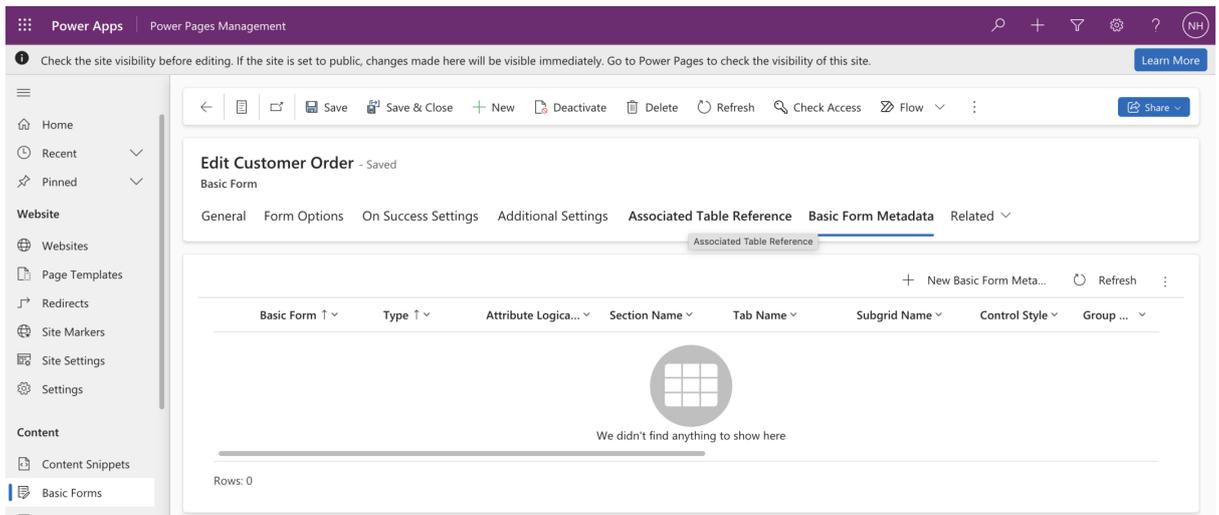


Notice that the Append permission has been added

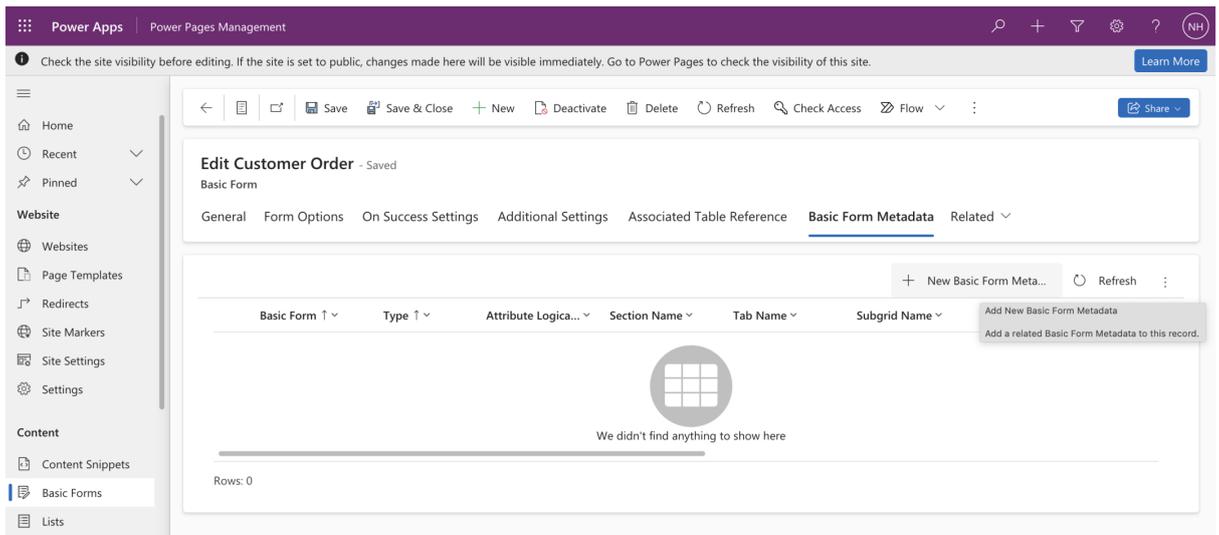


I added **Read, Update, Create, Delete** and **Append to** permissions to the Account Customer Orders Table permissions entry.

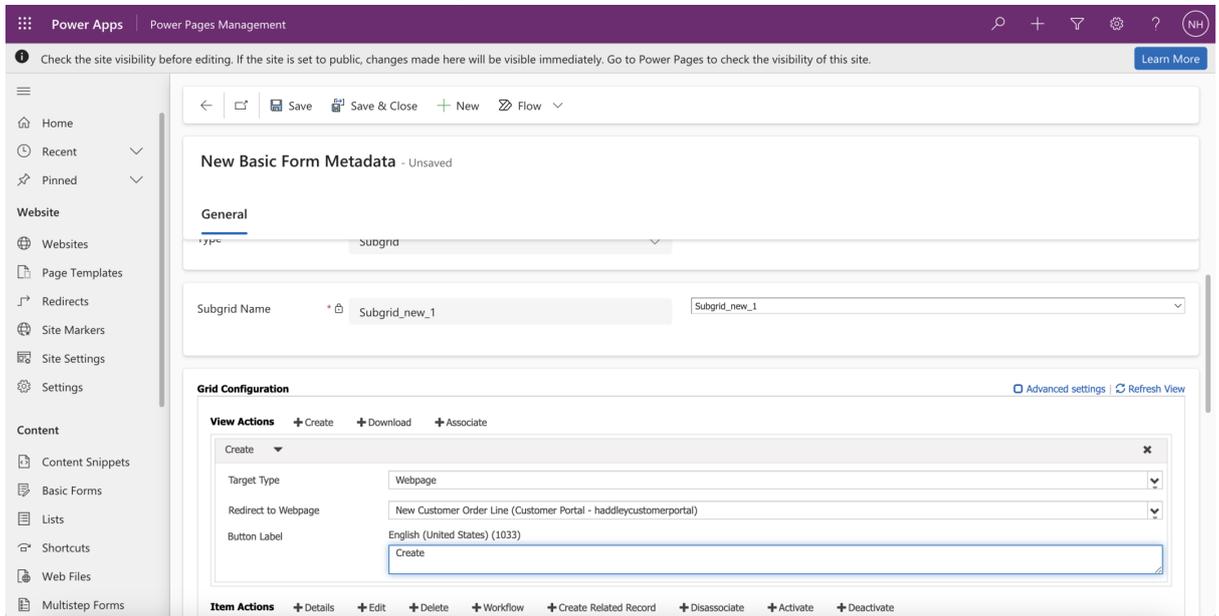
We would like a user to be able to create Customer Order Lines to existing Customer Orders



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



I added a Basic Form Metadata entry



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

Edit Customer Order

Requested Delivery Date *
1/2/2025

Create

Name ↑	Item	Quantity	Created On
Line-100000	ANTWERP Conference Table	1	12/20/2024 7:38 PM

Submit

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

Lookup records

Search

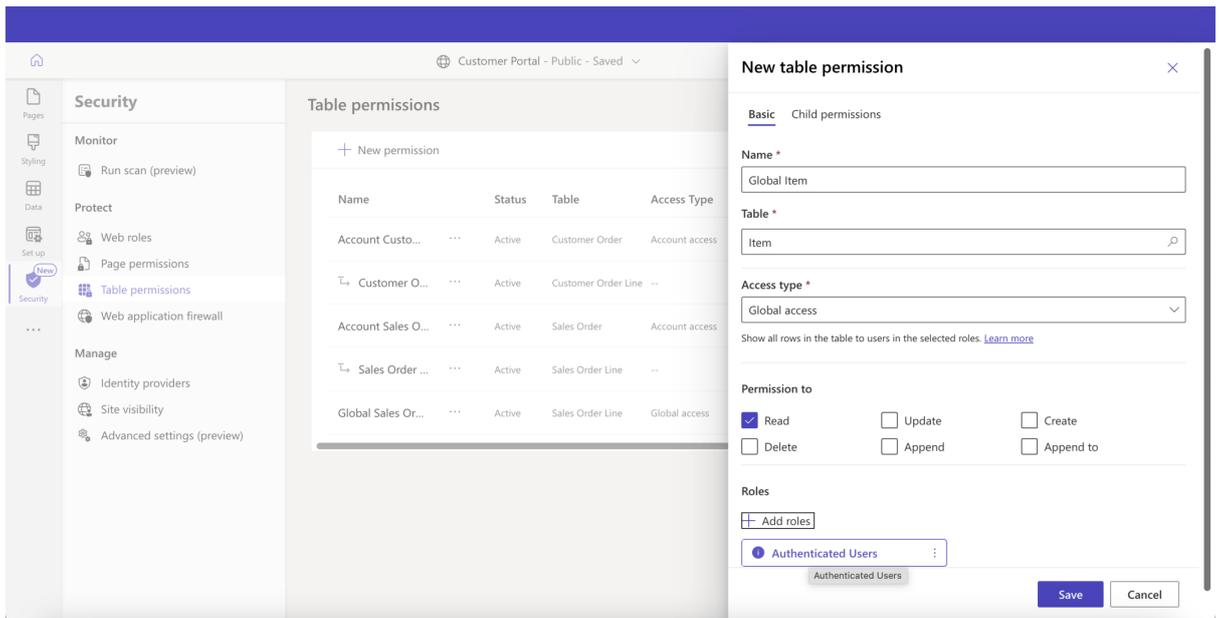
Choose one record and click Select to continue

- ✓ Display Name

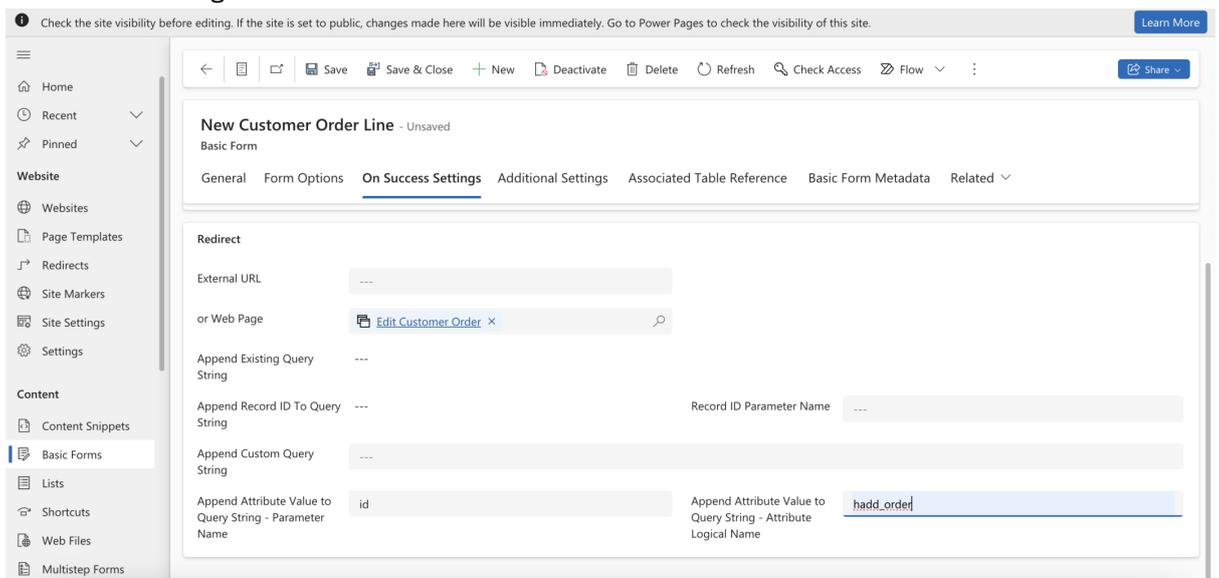
You don't have permissions to view these records.

Select Cancel Remove value

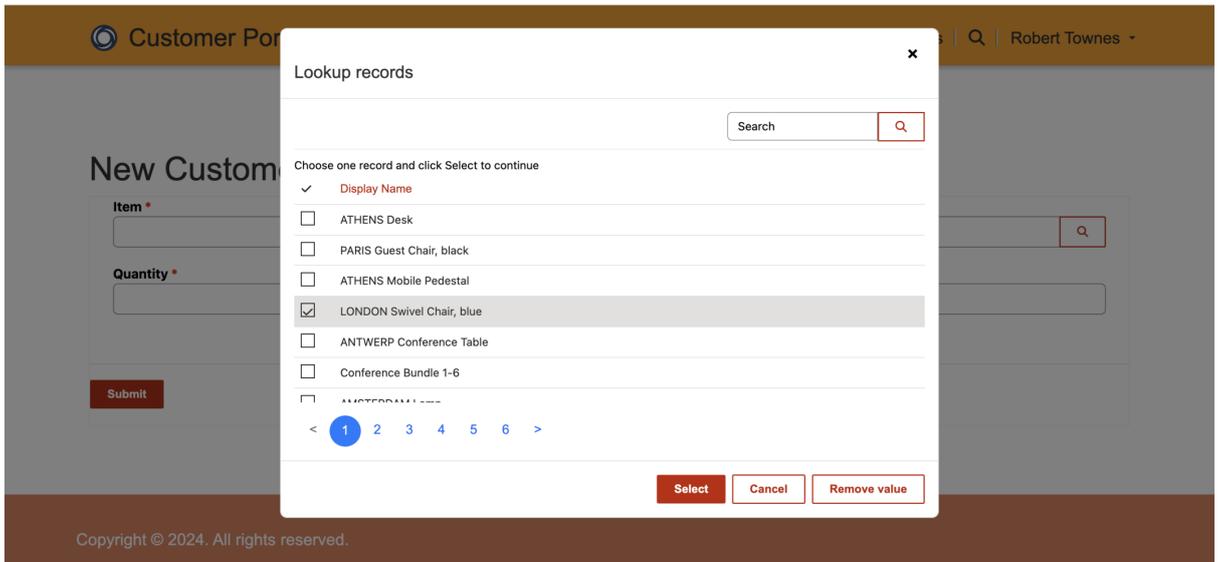
I was not able to lookup Items



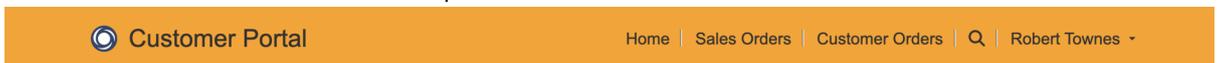
I added a Global table permission. The Global table permission provides access to all rows/records in given table



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



I selected a Customer Order Lines | Item



New Customer Order Line

Item *

LONDON Swivel Chair, blue

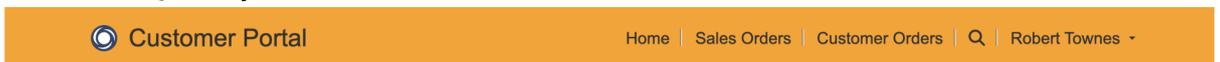
Quantity *

4

Submit

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I entered a Quantity and clicked the Submit button



Edit Customer Order

Requested Delivery Date *

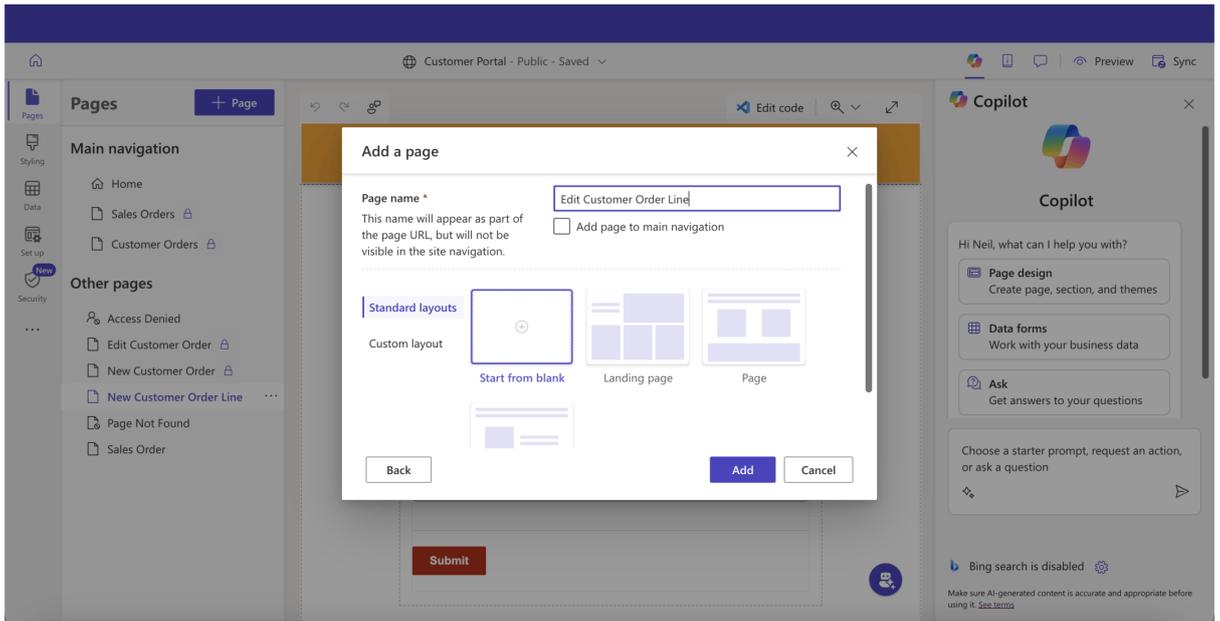
1/2/2025

Create

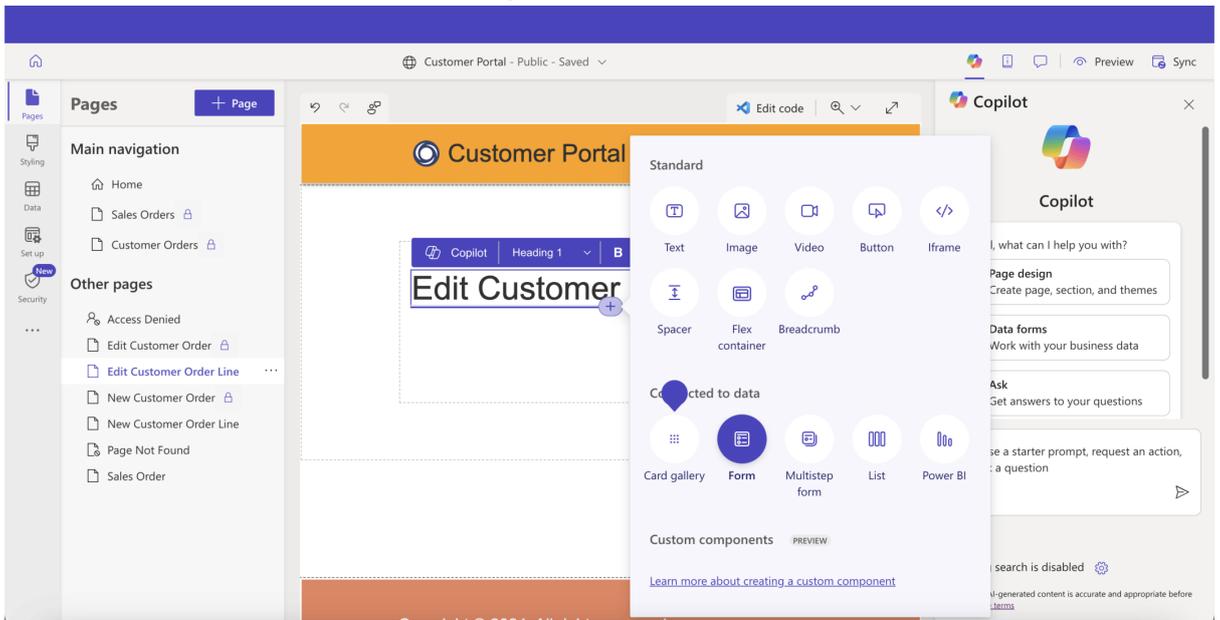
Name ↑	Item	Quantity	Created On
Line-100000	ANTWERP Conference Table	1	12/20/2024 7:38 PM
Line-100001	LONDON Swivel Chair, blue	4	12/20/2024 8:04 PM

Submit

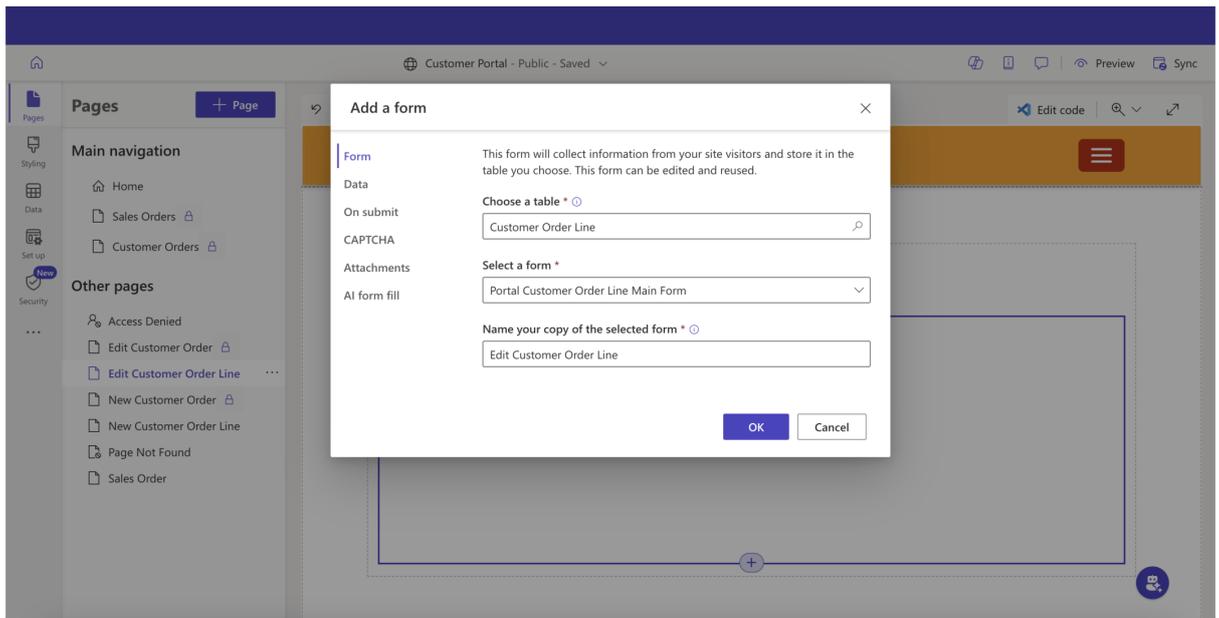
I was redirected back to the **Edit Customer Order** page



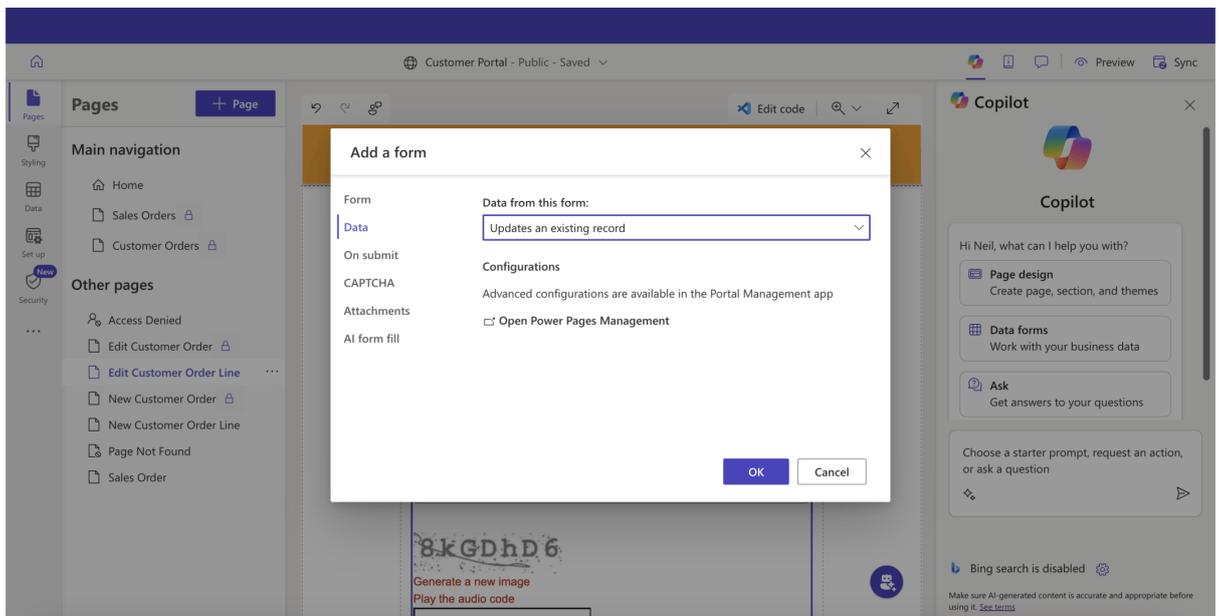
I added an Edit Customer Order Line page



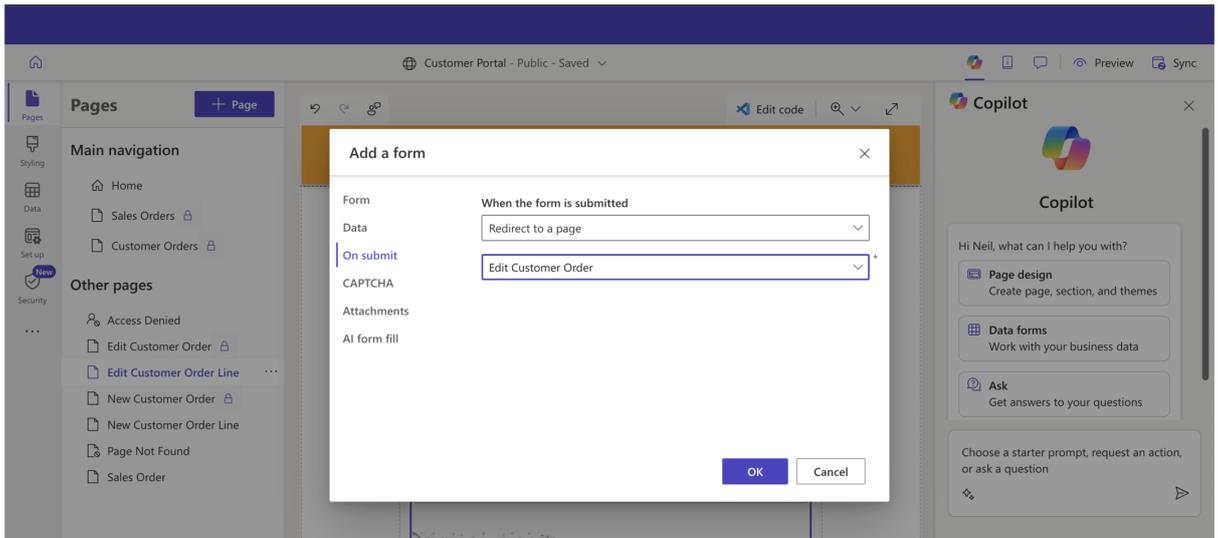
I added a form



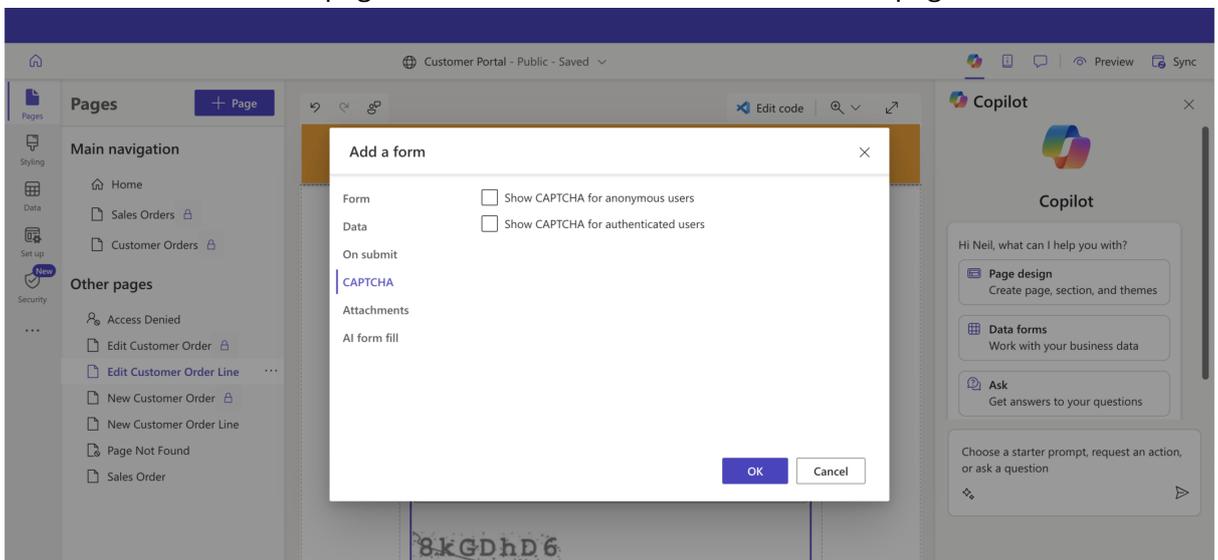
I named the new form Edit Customer Order Line



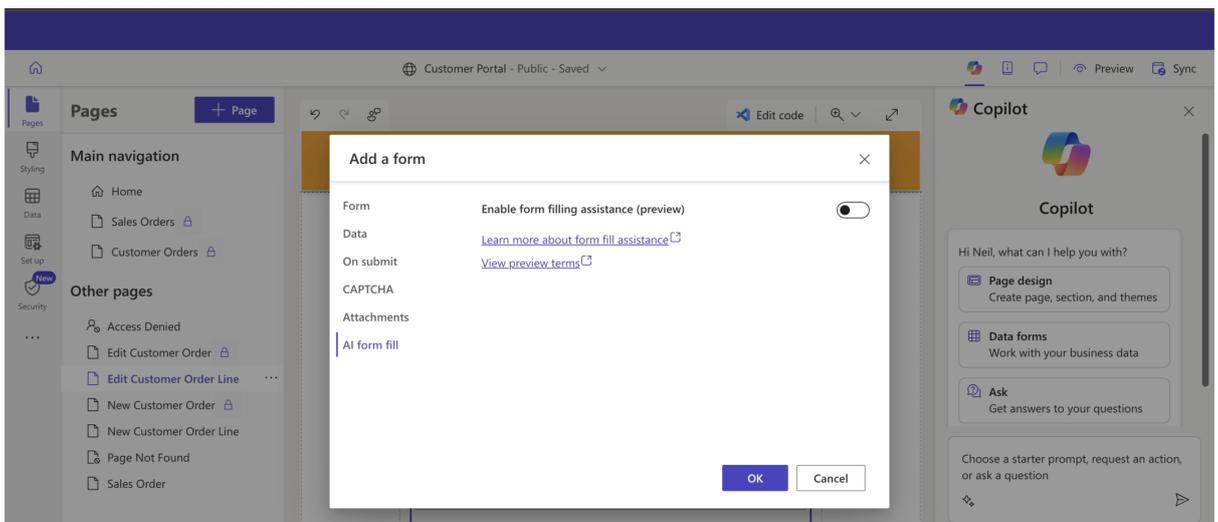
The new form would allow a user to update a Customer Order Line



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



I cleared the CAPTCHA boxes



I disabled AI form filling

Power Apps | Power Pages Management

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. [Learn More](#)

Home Recent Pinned Website Websites Page Templates Redirects Site Markers Site Settings Settings Content Content Snippets Basic Forms Lists Shortcuts Web Files Multistep Forms

Save Save & Close New Deactivate Delete Refresh Check Access Flow Share

Edit Customer Order Line - Unsaved

Basic Form

General Form Options **On Success Settings** Additional Settings Associated Table Reference Basic Form Metadata Related

Redirect

External URL: ---

or Web Page: [Edit Customer Order](#)

Append Existing Query: ---

String

Append Record ID To Query: --- Record ID Parameter Name: ---

String

Append Custom Query: ---

String

Append Attribute Value to Query String - Parameter Name: id Append Attribute Value to Query String - Attribute Logical Name: [hadd_order](#)

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

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. [Learn More](#)

Home Recent Pinned Website Websites Page Templates Redirects Site Markers Site Settings Settings Content Content Snippets Basic Forms Lists Shortcuts Web Files Multistep Forms

Save Save & Close New Deactivate Delete Refresh Check Access Flow Share

Edit Customer Order Subgrid_new_1 - Unsaved

Basic Form Metadata

General Related

Button Label: English (United States) (1033) Create

Item Actions + Details + Edit + Delete + Workflow + Create Related Record + Disassociate + Activate + Deactivate

Edit

Target Type: Webpage

Redirect to Webpage: [Edit Customer Order Line \(Customer Portal - haddleycustomerportal\)](#)

Button Label: English (United States) (1033) Edit

Delete

Button Label: English (United States) (1033) Delete

Override Column Attributes

I added an Edit and a Delete menu item

haddleycustomerportal.powerappsportals.com/Edit-Customer-Order?id=14b67e1a-61ba-ef11-95f5-6045bd00d1a0

Edit Customer Order

Requested Delivery Date: 1/2/2025 [Create](#)

Name ↑	Item	Quantity	Created On	
Line-100000	ANTWERP Conference Table	1	12/20/2024 7:38 PM	Edit Delete
Line-100001	LONDON Swivel Chair, blue	4	12/20/2024 8:04 PM	Edit Delete

[Submit](#)

I used the Edit button to update a Customer Order Line

Edit Customer Order Line

Item *
LONDON Swivel Chair, blue [x] [Q]

Quantity *
6

Submit

I updated the Quantity

Edit Customer Order

Requested Delivery Date *
1/2/2025 [calendar icon]

Create

Name ↑	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	▼

Submit

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

Customer Orders

Create

Name ↑	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

I added the related **Item | Unit Price** and **Item | Based Unit of Measure** columns to the Portal Active Customer Order Lines view

Edit Customer Order

Requested Delivery Date *
12/17/2024 🗑️

Create

Name ↑	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	⌵

Submit

