

Xpand Portal Connector Overview

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

The app consists of the following elements:

Portal Integration Setup

The screenshot shows the 'Portal Integration Setup' configuration page. At the top, it displays 'Work Date: 1/28/2027' and a 'Saved' status. The page is divided into several sections: 'Integration', 'Documents', 'Notification', and 'Data'. The 'Integration' section includes a 'Test Connection' button and a grid of settings: 'Enabled' (toggle on), 'Client ID' (DEMOID), 'Company Integration Code' (DEMO), 'Client Secret' (masked), 'Web Service URL' (https://[your_domain]/sync/SyncService.svc), and 'Log Preservation Period' (1W). The 'Documents' section has a 'Document Folder Name' field. The 'Notification' section includes 'Notification Enabled' (toggle on) and 'Notification Emails' field. The 'Data' section includes 'Include Field Length' (toggle on), 'Use Modify Trigger on Manual E...' (toggle on), and 'Max. No. of Records per XML' (1000).

This is a general setup where you toggle integration between Business Central and Xpand Portal on and off as well as configure connection settings:

- The Business Central company that will be used as a data source on the portal
- Web service URL, client ID, and client secret that are required to authorize communication with Xpand Portal
- How long the integration log entries should be stored before they are automatically deleted (using a job queue entry)
- A server folder where the attached documents imported from Xpand Portal are stored

Additionally, in this setup, you can enable notifications about issues related to job queue entries that are used for automatic import and export of data during synchronization. If enabled, you specify email(s), to which notifications will be sent. Notifications include such information as the job queue entry(ies) that stopped running due to an error (have the status **Error**), the reason why they stopped running, and error text.

In the data-related settings, you can choose whether you want to include the `DataLength` field property value in exported data and configure the maximum number of records that can be exported in a single XML file, and choose whether you want to use the Modify trigger instead of Insert on manual data export.



Portal Entities

Portal Entities

+ New Manage Home Release Export Import Entity

Move Up Move Down

Code	Name	Description	Direction	Status	Last Exported Date-Time	Last Imported Date-Time	Last Portal Updated Date-Time	Processing Order ↑
LOCATIONS	Locations		Export	Released	6/23/2025 12:37 ...			
ITEM-UOM	Item Units of Measure		Export	Open	6/17/2025 1:53 PM			
SO-HEADER	Sales Order Header		Both	Released	6/23/2025 12:37 ...	6/23/2025 12:38 ...	6/19/2025 6:08 PM	
SO-LINES	Sales Order Lines		Both	Released	6/23/2025 12:37 ...	6/23/2025 12:38 ...	6/18/2025 2:33 PM	
SI-HEADER	Sales Invoice Header		Export	Released	6/23/2025 12:37 ...			
SI-LINES	Sales Invoice Lines		Export	Released	6/23/2025 12:37 ...			
CUSTOMERS	Customers		Both	Released	6/23/2025 12:37 ...	6/23/2025 12:38 ...	6/18/2025 2:28 PM	
CONTACTS	Contacts		Both	Released	6/23/2025 12:37 ...	6/23/2025 12:38 ...	6/18/2025 2:28 PM	
COMPANY ...	Company Information		Export	Released	6/23/2025 12:37 ...			
SS-HEADER	Sales Shipment Header		Export	Released	6/23/2025 12:37 ...			
SS-LINES	Sales Shipment Lines		Export	Released	6/17/2025 1:53 PM			
ITEMS	Items		Both	Released	6/23/2025 12:37 ...	6/23/2025 12:38 ...	6/17/2025 4:29 PM	
SALESPRICE1	Sales Price	Sales Prices for Customer Price...	Export	Released	6/23/2025 12:37 ...			
SALESPRICE2	Sales Price	Sales prices for All Customers	Export	Released	6/23/2025 12:37 ...			

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

On the entity card, you set up the tables and fields the entity will consist of. A portal entity can consist of one or many Business Central tables. It is up to you to choose which fields in those tables will be synchronized.



ORD-SO-LINES · Used for the Customer order management module.

Release Export Import Entity ①

General

Code	ORD-SO-LINES	Last Exported Date-Time	12/3/2025 3:31 PM
Name	SalesOrderLine	Last Imported Date-Time	12/3/2025 3:31 PM
Description	Used for the Customer order manag...	Last Portal Updated Date-T...	12/2/2025 5:14 PM
Direction	Both		
Status	Open		
No. of Hours between Runs	0		

Lines | Manage | Line

New Delete Decrease Indent Increase Indent Move Up Move Down

	Source Type	Source Subtype	Source ID	Source Name	Node Name	Node Value	Import New Values	Validate Field on Import	Primary Key Contains Autoinc...	Convert Link to File
→	Table		37	Sales Line	SalesLine		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		1	Document Type	DocumentT...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		3	Document No.	DocumentNo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		4	Line No.	LineNo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		5	Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		6	No.	No		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		10	Shipment Date	ShipmentD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Import

Skip Insertion Trigger Skip Modification Trigger

Skip Deletion Trigger

Export

Skip Deletion Synch. Clear Old Unmatched Data

Skip Insertion Synch. Max. No. of Records per XML

Skip Modification Synch.

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

- Specify whether new values for a field should be imported.
- Enable field validation for a certain field on data import.
- Specify whether the primary key of the selected table contains an autoincremented field.
- Choose to convert links to files.
- Choose to skip table triggers (Insert, Modify, and/or Delete) on data import if necessary.
- Choose to skip various operations (deletion, insertion, and/or modification) on data export if necessary.
- Specify the maximum number of records that will be exported in a single file.
- Set up filters to only import data that meets the specified criteria.



- Set up primary key default values to define how records will be created in Business Central in case imported data doesn't have primary keys specified.

Once you release a portal entity, it is ready for data synchronization.

Data synchronization

There are two ways how synchronization can be performed:

- Manually, directly from a portal entity card. You use the **Export Entity to Portal** and **Import Entity from Portal** (or **Import Entity from XML**) actions to export or import entity data correspondingly. Additionally, you can only export the structure of an entity using the **Export Entity Structure** action, which may be useful when you want to send the fields of the entity to the portal, but don't want to synchronize its data.

Portal Entity Card | Work Date: 1/28/2027



ORD-SO-LINES · Used for the Customer order management module.

Release [Export](#) Import Entity

[Export Entity to Portal](#) [Export Entity Structure](#)

Code	ORD-SO-LINES	Last Exported Date-Time	12/3/2025 3:31 PM
Name	SalesOrderLine	Last Imported Date-Time	12/3/2025 3:31 PM
Description	Used for the Customer order manag...	Last Portal Updated Date-T...	12/2/2025 5:14 PM
Direction	Both		
Status	Released		
No. of Hours between Runs	0		

Lines | [Manage](#) Line

[New](#) [Delete](#) [Decrease Indent](#) [Increase Indent](#) [Move Up](#) [Move Down](#)

	Source Type	Source Subtype	Source ID	Source Name	Node Name	Node Value	Import New Values	Validate Field on Import	Primary Key Contains Autoinc...	Convert Link to File
→	Table	:	37	Sales Line	SalesLine		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		1	Document Type	DocumentT...	_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		3	Document No.	DocumentNo	_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		4	Line No.	LineNo	_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		5	Type	Type	_	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		6	No.	No	_	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Field		10	Shipment Date	ShipmentD...	_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Import > No No No

Export > No No No

- Automatically by configuring a job queue entry.



Utilizing job queue entries for automatic operations

Business Central job queue entries with custom codeunits are used to perform various automatic operations during synchronization.

When you enable integration in the portal integration setup, you also have the option to automatically configure the job queue entries that handle data synchronization as well as set their status to **Ready**. Otherwise, the job queue entries need to be set up manually. When you disable integration, you have the option to also suspend the job queue entries that handle data synchronization.

You can set job queue entries to automatically perform the following:

- Import portal entity data
- Export portal entity data
- Send automatic notifications about issues with data import/export to the email(s) specified in the portal integration setup
- Re-import faulty portal entities that couldn't be imported during the first attempt
- Clear old portal integration log entries



Portal Integration Log

Portal Integration Log



Entry No. ↓	Direction	Entity Code	Entity Name	Start Date-Time	Finish Date-Time	No. of Processing Errors	Import/Export Error Message
9321	Import	ITEMS	Items	6/23/2025 3:54 PM	6/23/2025 3:54 PM	--	
9313	Import	ITEMS	Items	6/23/2025 3:48 PM	6/23/2025 3:48 PM	--	
9305	Import	ITEMS	Items	6/23/2025 3:43 PM	6/23/2025 3:43 PM	--	
9297	Import	ITEMS	Items	6/23/2025 3:38 PM	6/23/2025 3:38 PM	--	
9289	Import	ITEMS	Items	6/23/2025 3:33 PM	6/23/2025 3:33 PM	--	
9281	Import	ITEMS	Items	6/23/2025 3:28 PM	6/23/2025 3:28 PM	--	
9273	Import	ITEMS	Items	6/23/2025 3:23 PM	6/23/2025 3:23 PM	--	
9265	Import	ITEMS	Items	6/23/2025 3:18 PM	6/23/2025 3:18 PM	--	
9257	Import	ITEMS	Items	6/23/2025 3:13 PM	6/23/2025 3:13 PM	--	
9249	Import	ITEMS	Items	6/23/2025 3:08 PM	6/23/2025 3:08 PM	--	
9241	Import	ITEMS	Items	6/23/2025 3:03 PM	6/23/2025 3:03 PM	--	
9231	Import	ITEMS	Items	6/23/2025 2:58 PM	6/23/2025 2:58 PM	--	
9223	Import	ITEMS	Items	6/23/2025 2:53 PM	6/23/2025 2:53 PM	--	
9212	Import	ITEMS	Items	6/23/2025 2:48 PM	6/23/2025 2:48 PM	--	
9204	Import	ITEMS	Items	6/23/2025 2:43 PM	6/23/2025 2:43 PM	--	
9196	Import	ITEMS	Items	6/23/2025 2:38 PM	6/23/2025 2:38 PM	--	
9188	Import	ITEMS	Items	6/23/2025 2:33 PM	6/23/2025 2:33 PM	--	
9180	Import	ITEMS	Items	6/23/2025 2:28 PM	6/23/2025 2:28 PM	--	
9172	Import	ITEMS	Items	6/23/2025 2:23 PM	6/23/2025 2:23 PM	--	
9164	Import	ITEMS	Items	6/23/2025 2:18 PM	6/23/2025 2:18 PM	--	
9156	Import	ITEMS	Items	6/23/2025 2:13 PM	6/23/2025 2:13 PM	--	
9147	Export	ITEMS	Items	6/23/2025 2:13 PM	6/23/2025 2:13 PM	--	
9144	Import	ITEMS	Items	6/23/2025 2:08 PM	6/23/2025 2:08 PM	--	
9136	Import	ITEMS	Items	6/23/2025 2:03 PM	6/23/2025 2:03 PM	--	
9125	Import	ITEMS	Items	6/23/2025 1:58 PM	6/23/2025 1:58 PM	--	

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

If there is more than one error for a single log entry, these errors can be viewed in the **Portal Log Error Details** window.



