

Xpand Portal Connector Overview

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

The app consists of the following elements:

Portal Connection Setup

The screenshot displays the 'Portal Integration Setup' configuration page. At the top, it shows 'Work Date: 1/22/2026' and a 'Saved' status. The page title is 'Portal Integration Setup'. Below the title, there is a 'Test Connection' button. The 'Integration' section contains several fields: 'Enabled' (toggle switch, turned on), 'Client ID' (text box with 'DEMOID'), 'Company Integration Code' (text box with 'BC24'), 'Client Secret' (text box with masked characters), 'Web Service URL' (text box with 'https://[your_domain]/sync/syncservice.svc'), and 'Log Preservation Period' (text box with '1W'). The 'Notification' section contains 'Notification Enabled' (toggle switch, turned on) and 'Notification Emails' (text box with 'admin@contoso.com;hr@contoso.com').

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.



Portal Entities

Portal Entities | Work Date: 1/22/2026

+ 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	Open	4/22/2024 1:58 PM	4/25/2024 2:53 PM	4/22/2024 12:14 PM	1
ITEM-UOM	Item Units of Measure		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	2
SO-HEADER	Sales Order Header		Both	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/22/2024 12:14 PM	3
SO-LINES	Sales Order Lines		Both	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	4
SI-HEADER	Sales Invoice Header		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	5
SI-LINES	Sales Invoice Lines		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	6
CUSTOMERS	Customers		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	7
CONTACTS	Contacts		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	8
COMPANY IN...	Company Information		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	9
SS-HEADER	Sales Shipment Header		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	10
SS-LINES	Sales Shipment Lines		Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	11
ITEMS	Items		Both	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/22/2024 11:58 AM	12
SALESPRICE1	Sales Price	Sales Prices fo...	Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	13
SALESPRICE2	Sales Price	Sales prices fo...	Export	Released	4/25/2024 2:33 PM	4/25/2024 2:33 PM	4/23/2024 5:23 PM	14

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.

Portal Entity Card | Work Date: 1/22/2026

Release Export Import Entity

Release Reopen

ITEMS

General

Code: ITEMS Last Exported Date-Time: 4/25/2024 6:05 PM

Name: Items Last Imported Date-Time: 4/25/2024 6:05 PM

Description: Last Portal Updated Date-Time: 4/22/2024 12:58 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 Autoin...
Table		27	Item	Item		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field		1	No.	No		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field		3	Description	Description		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field		8	Base Unit of Measure	BaseUnitofMeasure		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field		18	Unit Price	UnitPrice		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field		31	Vendor No.	VendorNo		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Import

Skip Table Triggers on Import

Export

Skip Deletion Synch. Clear Old Unmatched Data



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

Once you release 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: 1/22/2026

ITEMS

Release **Export** Import Entity

Export Entity to Portal Export Entity Structure

General

Code ITEMS Last Exported Date-Time 4/25/2024 6:35 PM

Name Items Last Imported Date-Time 4/25/2024 6:35 PM

Description Last Portal Updated Date-Time 4/22/2024 12:58 PM

Direction Both

Status Released

No. of Hours between Runs 0

Lines Manage Line

Source Type	Source Subtype	Source ID	Source Name	Node Name	Node Value	Import New Values	Validate Field on Import	Primary Key Contains Autoincremented
Table		27	Item	Item	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	No.	1	No.	No	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	Description	3	Description	Description	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	Base Unit of Measure	8	Base Unit of Measure	BaseUnitofMeasure	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	Unit Price	18	Unit Price	UnitPrice	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	Vendor No.	31	Vendor No.	VendorNo	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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 | Work Date: 1/22/2026

View Processing Errors | Export File | Delete Entries Older Than 7 Days | Delete All Entries | Show Error Message

Entry No. ↓	Direction	Entity Code ▼	Entity Name	Start Date-Time	Finish Date-Time	No. of Processing Errors	Import Error Message
2305	Import	SO-HEADER	Sales Order Header	4/24/2024 4:41 AM	4/24/2024 4:41 AM	--	
2301	Import	SO-HEADER	Sales Order Header	4/24/2024 4:36 AM	4/24/2024 4:36 AM	--	
2297	Import	SO-HEADER	Sales Order Header	4/24/2024 4:31 AM	4/24/2024 4:31 AM	--	
2293	Import	SO-HEADER	Sales Order Header	4/24/2024 4:26 AM	4/24/2024 4:26 AM	--	
2289	Import	SO-HEADER	Sales Order Header	4/24/2024 4:21 AM	4/24/2024 4:21 AM	--	
2285	Import	SO-HEADER	Sales Order Header	4/24/2024 4:16 AM	4/24/2024 4:16 AM	--	
2281	Import	SO-HEADER	Sales Order Header	4/24/2024 4:11 AM	4/24/2024 4:11 AM	--	
2277	Import	SO-HEADER	Sales Order Header	4/24/2024 4:06 AM	4/24/2024 4:06 AM	--	
2273	Import	SO-HEADER	Sales Order Header	4/24/2024 4:01 AM	4/24/2024 4:01 AM	--	
2269	Import	SO-HEADER	Sales Order Header	4/24/2024 3:56 AM	4/24/2024 3:56 AM	--	
2265	Import	SO-HEADER	Sales Order Header	4/24/2024 3:51 AM	4/24/2024 3:51 AM	--	
2263	Import	SO-HEADER	Sales Order Header	4/24/2024 3:49 AM	4/24/2024 3:49 AM	1	
2259	Import	SO-HEADER	Sales Order Header	4/24/2024 3:46 AM	4/24/2024 3:46 AM	--	
2255	Import	SO-HEADER	Sales Order Header	4/24/2024 3:41 AM	4/24/2024 3:41 AM	--	
2251	Import	SO-HEADER	Sales Order Header	4/24/2024 3:36 AM	4/24/2024 3:36 AM	--	
2247	Import	SO-HEADER	Sales Order Header	4/24/2024 3:31 AM	4/24/2024 3:31 AM	--	

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.



1034743	Export	ITEM	Item	7/7/2021 11:16 AM	7/7/2021 11:17 AM	Multiple Errors...
1034742	Export	ITEM	Item	7/7/2021 11:16 AM	7/7/2021 11:16 AM	Multiple Errors...
1034741	Export	ITEM	Item	7/7/2021 10:48 AM	7/7/2021 10:49 AM	Multiple Errors...
1034740	Export	ITEM	Item	7/7/2021 10:37 AM	7/7/2021 10:37 AM	Multiple Errors...
1034739	Export	ITEM	Item	7/7/2021 10:35 AM	7/7/2021 10:35 AM	Multiple Errors...

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

