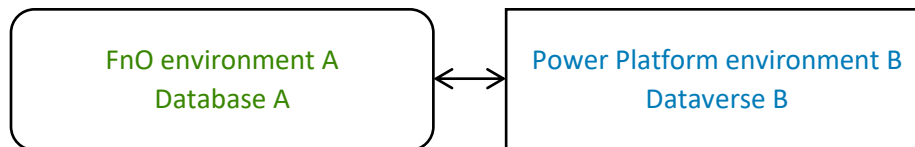


Database and Dataverse Movement (Copy, Refresh, Restore)

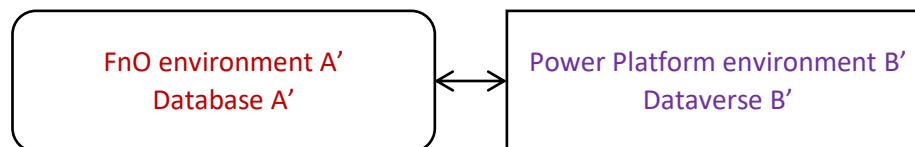
For standard Inventory Visibility add-in users, a Dynamics 365 Finance and Operation (referred to as FnO) environment is linked to a Power Platform environment. Usually, for the purpose of testing, users may perform movement operation on Database in FnO environment or Dataverse in Power Platform environment. According to the operation type, detailed instructions are listed in the table below.

For IV users who also use IOM, additional attention is needed to make sure that IV installation is prior to IOM installation. For IOM users who only use integrated IV plugin inside IOM Power App, please contact IOM team for support.

Source (mostly Production environments):



Target (Sandbox environments):



Suppose that **FnO environment A** and **Power Platform environment B** are the pair of environments to start with (in many cases they are Production environments), self-service instructions are provided for the following operations.

Movement Operation

[Only copy A to A'](#)

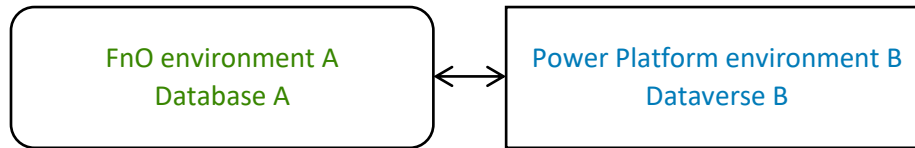
[Only copy B to B'](#)

[Copy A to A' and copy B to B'](#)

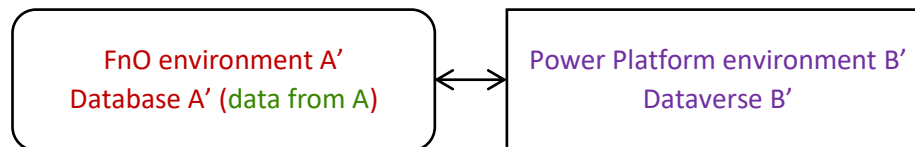
If the target environment (**A'** and **B'**) of your movement operation are Production environments, no matter which action you want to take, please contact inventvisibilitysupp@microsoft.com with your detailed scenario for further support.

Only copy FnO Database A to Database A'

Source:



Target:



1. Follow Database guide to copy FnO Database A to Database A'.
2. In FnO environment A', go to Inventory management -> Setup -> Inventory Visibility integration parameters. Enable Resync before initial push and save.

The screenshot shows the 'Inventory Visibility integration parameters' page. The 'General' tab is selected. On the left, there are checkboxes for 'Enable WMS items', 'Enable soft reservation', 'Inventory adjustment offset', and 'Transaction'. On the right, under 'Set up Inventory Visibility integration', there is a text field for 'Inventory Visibility endpoint' with the value 'https://inventoryservice.wus-1...', a dropdown for 'Maximum number of records in ...' set to '512', and a toggle switch for 'Resync before initial push' which is currently turned 'Yes'.

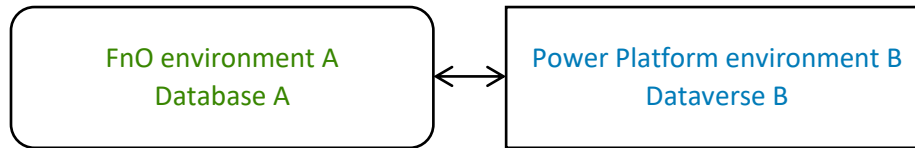
3. Go to Inventory management -> Periodic tasks -> Inventory Visibility integration, disable the job and then re-enable it. FnO data is synced to IV as the record count decreases.

The screenshot shows the 'Inventory Visibility integration' status page. The 'General' tab is selected. At the top, there are buttons for 'Enable', 'Disable', and 'Options'. Below, there is a table with the following data:

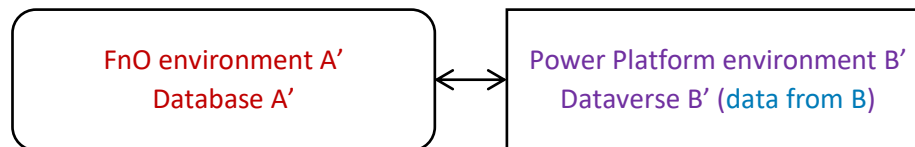
| Status | Resync job status | Executed date | Records to be posted to the Inve... | WHS-specific Records to be post... | Soft Reserve Event Records to be... |
|---------|-------------------|---------------|-------------------------------------|------------------------------------|-------------------------------------|
| Enabled | Completed | 4/28/2024 | 0 | 0 | 0 |

Only copy Power Platform Dataverse B to Dataverse B'

Source:

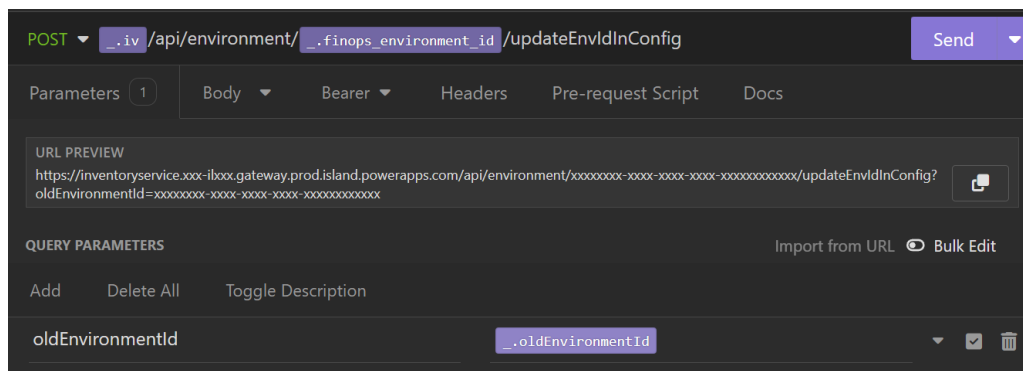


Target:



1. In target environment **A'** and **B'**, ensure that IV has been installed. This step is for the registration of target environment. ([What to do if you miss this step](#))
2. Follow Dataverse guide to copy Power Platform **Dataverse B** to **Dataverse B'**.
3. Follow [authentication through API](#) to obtain an access token.
4. Send the following API request with the above access token to refresh the environment id in IV configuration.

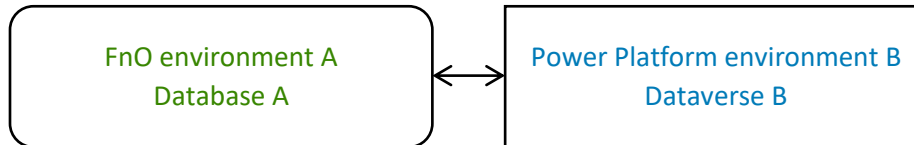
| | |
|-------------------------------|--|
| Endpoint | Endpoint of environment A' is recommended for the principle of consistency. But if you don't have it, endpoint of environment A also works for this API. |
| Path | /api/environment/{FnO_environment_id_A'}/updateEnvIdInConfig |
| Method | Post |
| Headers | Api-Version=1.0 Authorization=Bearer {access_token} Content-Type=application/json |
| Query (Url Parameters) | oldEnvironmentId={FnO_environment_id_A} |



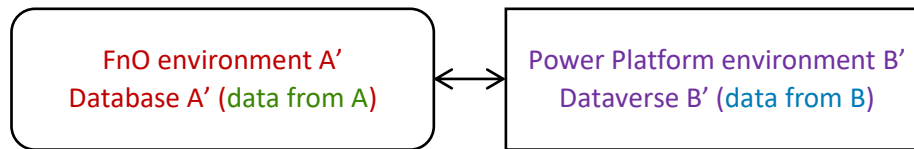
You should receive 200 OK status for this API. Otherwise, please retry.

Copy FnO Database A to Database A' and copy Power Platform Dataverse B to Dataverse B'

Source:

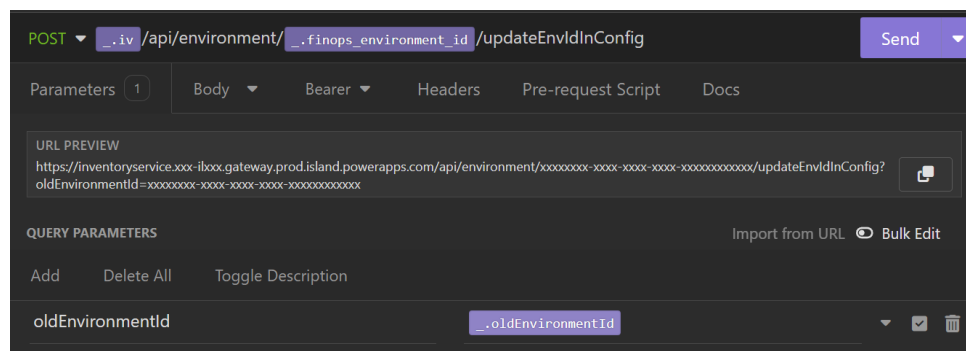


Target:



1. In target environment **A'** and **B'**, ensure that IV has been installed. This step is for the registration of target environment. ([What to do if you miss this step](#))
2. Follow Database guide to copy FnO **Database A** to **Database A'**, and follow Dataverse guide to copy Power Platform **Dataverse B** to **Dataverse B'**.
3. Follow [authentication through API](#) to obtain an access token.
4. Send the following API request with the above access token to refresh the environment id in IV configuration.

| | |
|-------------------------------|--|
| Endpoint | Endpoint of environment A' is recommended for the principle of consistency. But if you don't have it, endpoint of environment A also works for this API. |
| Path | /api/environment/{FnO_environment_id_A'}/updateEnvIdInConfig |
| Method | Post |
| Headers | Api-Version=1.0 Authorization=Bearer {access_token} Content-Type=application/json |
| Query (Url Parameters) | oldEnvironmentId={FnO_environment_id_A} |



You should receive 200 OK status for this API. Otherwise, please retry.

5. In **Power Platform environment B'**, go to IV Power App -> Admin Settings. Select [Update Configuration](#) for the previous step to take effect.
6. Select [Show Service Details](#). You should find service endpoint and environment id of **environment A'**. If they still appear to be the values of **environment A**, please refresh the page. From now on, please use this endpoint for **environment A'** wherever IV is called.
7. Since IV data is implicitly integrated with environment id, the IV data in **Dataverse B'** now is useless. IV works fine with this data left in Dataverse, so if Dataverse capacity allows, you may skip this cleanup step.
How to cleanup: Ensure that IV batch job in **FnO environment A'** is disabled and [Delete all inventory data](#). The delete job may take hours and once it starts, please retry until success. ([How to check the execution result of delete all inventory job?](#))
8. In **FnO environment A'**, go to Inventory management -> Setup -> Inventory Visibility integration parameters. Select Get Endpoint and save.

Finance and Operations Preview

Standard view

Inventory Visibility integration parameters

General

Enable WMS items

Enable soft reservation

Inventory adjustment offset

Transaction

Set up Inventory Visibility integration

Inventory Visibility endpoint:

Maximum number of records in ...:

Resync before initial push: ☒ Yes

[Get Endpoint](#)

9. Go to Inventory management -> Periodic tasks -> Inventory Visibility integration, disable the job and then re-enable it. FnO data is synced to IV as the record count decreases.

Finance and Operations Preview

Enable Disable Options

Standard view

Inventory Visibility integration

General Reservation offset Clean up data

| Status | Resync job status | Executed date | Records to be posted to the Inve... | WHS-specific Records to be post... | Soft Reserve Event Records to be... |
|---------|-------------------|---------------|-------------------------------------|------------------------------------|-------------------------------------|
| Enabled | Completed | 4/28/2024 | 0 | 0 | 0 |

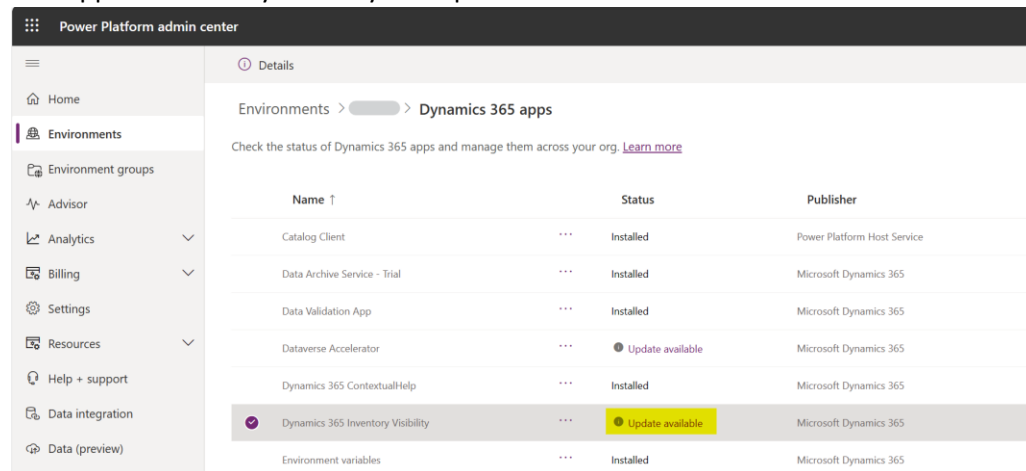
Troubleshooting

1. How to check the execution result of delete all inventory job?

While the delete job is executing, actions are blocked from IV Power App UI. After the job finishes, a success or failure message will pop out on top according to the execution result. If you missed the message, you may simply select again the Manage button of Delete all inventory data. If the previous job completed successfully and tables are clean, a success message will pop out immediately instead of the delete warning box (required solution version no older than 1.2.3.58).

2. I don't see the option of Delete all inventory data.

Go to Power Platform admin center and find the target environment. Select Dynamics 365 Apps -> Inventory Visibility and update.



Power Platform admin center

Details

Environments > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

| Name ↑ | Status | Publisher |
|-----------------------------------|------------------|-----------------------------|
| Catalog Client | Installed | Power Platform Host Service |
| Data Archive Service - Trial | Installed | Microsoft Dynamics 365 |
| Data Validation App | Installed | Microsoft Dynamics 365 |
| Dataverse Accelerator | Update available | Microsoft Dynamics 365 |
| Dynamics 365 ContextualHelp | Installed | Microsoft Dynamics 365 |
| Dynamics 365 Inventory Visibility | Update available | Microsoft Dynamics 365 |
| Environment variables | Installed | Microsoft Dynamics 365 |

3. I didn't install IV before I copied the Power Platform environment.

Without installation, the target environment is not registered to IV service, so you would encounter failures in the authentication step. For such cases, if you are able to access LCS page of the target environment, you may [install IV from LCS](#) with a new application (client) Id, and then you could proceed with the remaining steps. If not (such as UDE environments), please follow the below steps.

- [Register an application](#) and [add a client secret](#) to Microsoft Entra under your Azure subscription. Make a note of the **application (client) Id**, **client secret**, and **tenant Id** values.
- Go to Power Platform admin center.
- On the left panel, select Resources -> Dynamics 365 apps. Find Dynamics 365 Inventory Visibility in the app list and click Manage.

Power Platform admin center

3 Manage Details

To manage Power Apps and Power Automate resources, select an environment.

Dynamics 365 apps

See which apps are available to install and configure in your org (tenant). [Learn more](#)

| Name ↑ | Status ⓘ | Publisher | |
|---|----------|----------------|------------------------|
| Dynamics 365 HR Virtual Tables | ... | Enabled | Microsoft Dynamics 365 |
| Dynamics 365 Human Resources | ... | Enabled | Microsoft Dynamics 365 |
| Dynamics 365 Human Resources | ... | Enabled | Microsoft Dynamics 365 |
| Dynamics 365 Human Resources recruiting add-on (Pr... | ... | Enabled | Microsoft Dynamics 365 |
| Dynamics 365 Inventory On-hand Mobile Application | ... | Enabled | Microsoft Dynamics 365 |
| 2 Dynamics 365 Inventory Visibility | ... | Not Configured | Microsoft Dynamics 365 |
| Dynamics 365 Media Content Production Management | ... | Not Configured | Microsoft Dynamics SMB |
| Dynamics 365 Media - Fan Engagement Apps | ... | Not Configured | Microsoft Dynamics SMB |
| Dynamics 365 Media Portal | ... | Not Configured | Microsoft Dynamics SMB |
| Dynamics 365 Nonprofit Accelerator | ... | Not Configured | Microsoft Dynamics SMB |

- D. Select the target environment. Enter the application Id and tenant Id that are registered from Azure portal. Agree to the terms of service and click Install.

Power Platform admin center

Dynamics 365 apps > Dynamics 365 Inventory Visibility

Description

Select an environment *

AuroraBAPEnv135c0

Don't see your environment?

Enter application id of service * [What is this?](#)

Enter tenant id of service * [What is this?](#)

Package(s)

| Name | Version |
|--|----------|
| Dynamics 365 Inventory Visibility - Anchor | 1.2.3.70 |

[Terms of service](#)

☐ I agree to the terms of service *

Install Cancel

- E. During installation, the status of IV add-in is shown as Installing. After installation completes, the status will change to Installed and you may proceed with the remaining steps.

For further support, please contact us via InventVisibilitySupp@microsoft.com.