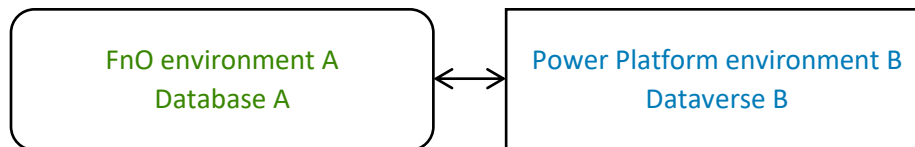


## Database and Dataverse Movement (Copy, Refresh, Restore)

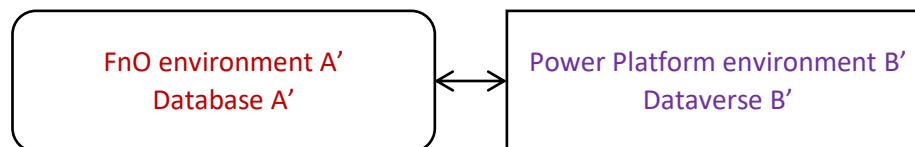
For standard Inventory Visibility add-in users, a Dynamics 365 Finance and Operation (referred to as FnO) environment is linked to a Power Platform environment. Usually, for the purpose of testing, users may perform movement operation on Database in FnO environment or Dataverse in Power Platform environment. 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'](#)

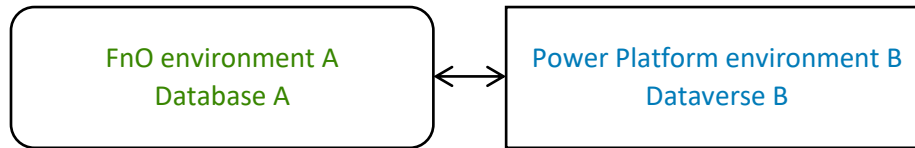
[Only copy B to B'](#)

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

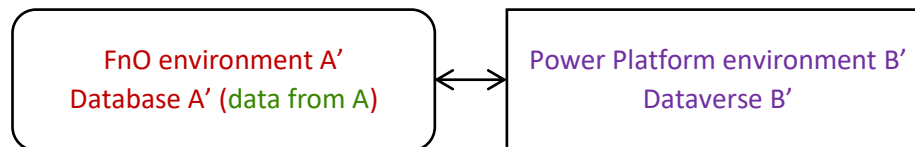
If the target environment (**A'** and **B'**) of your movement operation are Production environments, no matter which action you want to take, please contact [inventvisibilitysupp@microsoft.com](mailto:inventvisibilitysupp@microsoft.com) with your detailed scenario for further support.

## 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.

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

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.

Finance and Operations Preview

Standard view

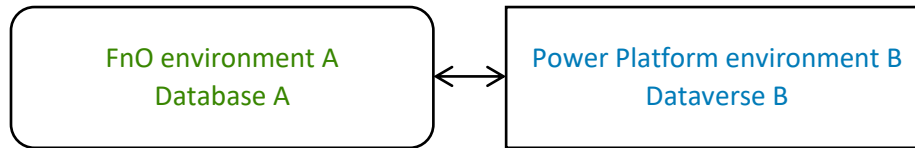
### Inventory Visibility integration

General Reservation offset Clean up data

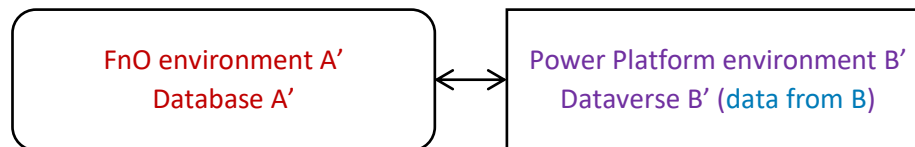
Status	Resync job status	Executed date	Records to be posted to the Inve...	WHS-specific Records to be post...	Soft Reserve Event Records to be...
Enabled	Completed	4/28/2024	0	0	0

## Only copy Power Platform Dataverse B to Dataverse B'

Source:

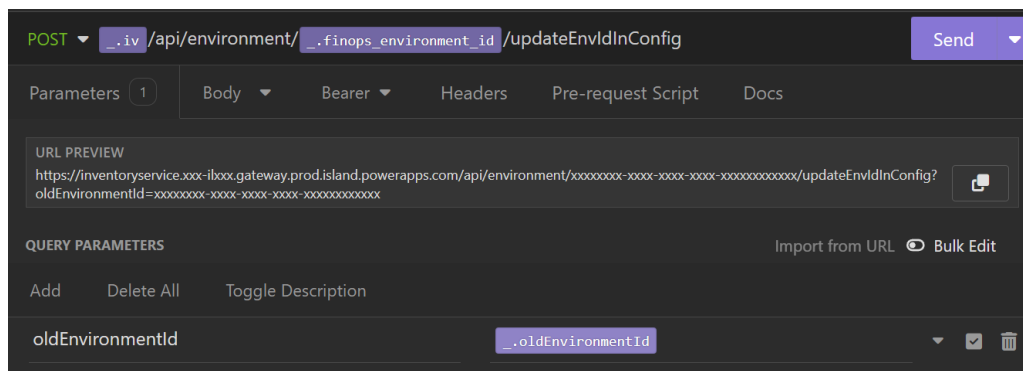


Target:



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.

<b>Endpoint</b>	Endpoint of <b>environment A'</b> ( <a href="#">What to do if you don't have the endpoint</a> )
<b>Path</b>	/api/environment/{ <b>FnO_environment_id_A'</b> }/updateEnvIdInConfig
<b>Method</b>	Post
<b>Headers</b>	Api-Version=1.0 Authorization=Bearer {access_token} Content-Type=application/json
<b>Query (Url Parameters)</b>	oldEnvironmentId={ <b>FnO_environment_id_A</b> }

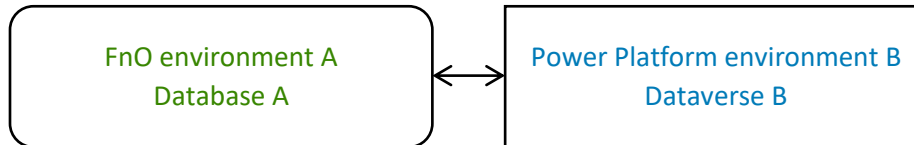


You should receive 200 OK status for this API. Otherwise, please retry.

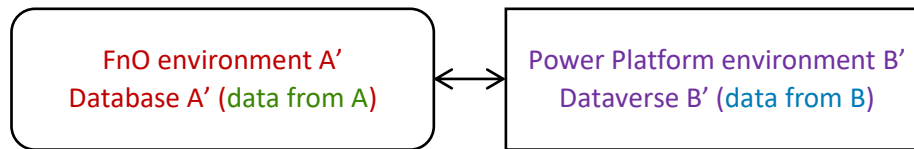


## Copy FnO Database A to Database A' and copy Power Platform Dataverse B to Dataverse B'

Source:

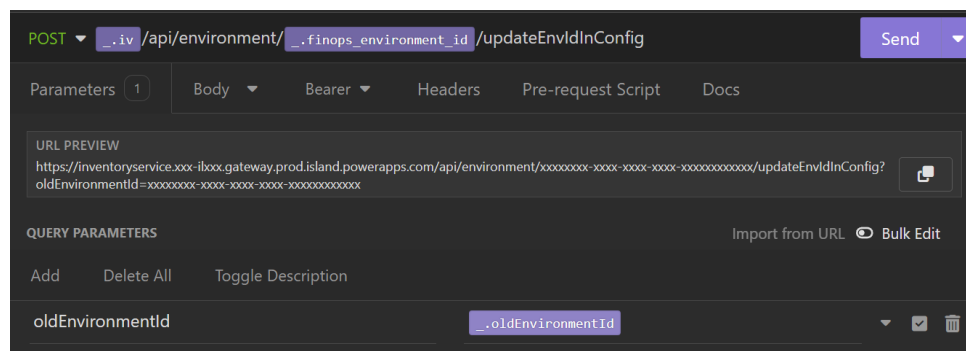


Target:



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.

<b>Endpoint</b>	Endpoint of <b>environment A'</b> ( <a href="#">What to do if you don't have the endpoint</a> )
<b>Path</b>	/api/environment/{ <b>FnO_environment_id_A'</b> }/updateEnvIdInConfig
<b>Method</b>	Post
<b>Headers</b>	Api-Version=1.0 Authorization=Bearer {access_token} Content-Type=application/json
<b>Query (Url Parameters)</b>	oldEnvironmentId={ <b>FnO_environment_id_A</b> }



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

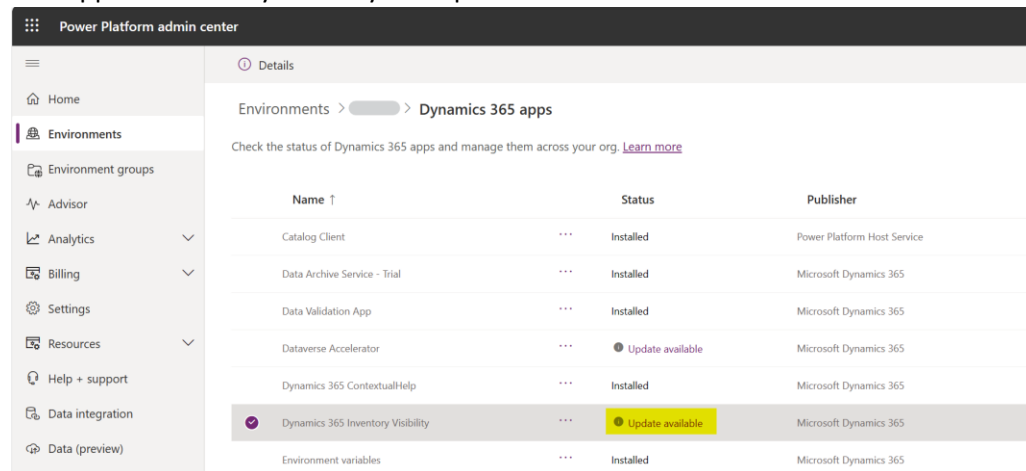
# Troubleshooting

## 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.



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, please follow the instructions according to your situation.

- 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 you are not able to access LCS page of the target environment (such as a UDE environment), please follow the below steps.
  - A. [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.
  - B. Go to Power Platform admin center.
  - C. 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.

4. I don't have the endpoint of target environment when refreshing the environment id in IV configuration.

Disable the auto-redirection of your client and send the updateEnvIdInConfig request with the endpoint of your source environment. (Continue on next page.)



- If the response status is 200, move on with the remaining steps.
- If the response status is 308 (Permanent Redirect), the endpoint of your target environment can be found in the Location field of the response headers. Note that query parameter (oldEnvironmentId) may not be captured in this field. Next, re-send the request with the endpoint of your target environment and the correct query parameter. After receiving a 200 response status, you can move on with the remaining steps.

308 Permanent Redirect

1.42 s

0 B

4 Minutes Ago

Preview

Headers11

Cookies

Timeline

Mock Response

NAME	VALUE
date	Tue, 25 Jun 2024 06:46:35 GMT
location	https://inventoryservice.wus-il101.gateway.prod.island.powerapps.com/api/environment/[REDACTED]/updateEnvIdInConfig
content-length	0
strict-transport-security	max-age=31536000; includeSubDomains
x-ms-islandgateway	GA0000004
x-servicefabric	NoRetry
x-ms-service-request-id	f1e9df23-ea32-4b7b-8a66-f8e1fcc71f27
x-ms-correlation-id	07048f40-ada2-4574-946a-94bf107de674
x-ms-activity-vector	00.01.00
server-timing	x-ms-igw-upstream-headers;dur=213.5,x-ms-igw-req-overhead;dur=2.6
x-content-type-options	nosniff

For further support, please contact us via [InventVisibilitySupp@microsoft.com](mailto:InventVisibilitySupp@microsoft.com).