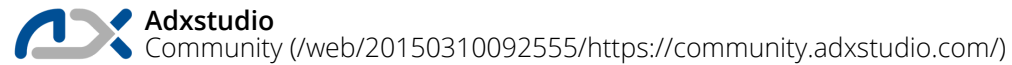


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/ Lookups on Forms

Lookups on Forms

Lookups to related records can be added to CRM forms that will be surfaced on the portal via Managed Forms (including Entity Forms and Adxstudio Web Forms). Just add them using the CRM Form Designer to the CRM Form and they will render on the portal.



Note that lookups will respect the configuration that you set on the CRM form, such as the CRM View that the lookup will draw records from.

If you have secured your Entity Forms or Web Forms, the lookup will respect those permissions and not allow records that the Portal User does not have permissions to be selected from the drop down

Customizing Lookup Interface Labels

There are several Content Snippets that can be created to provide your own text for the various labels present in the modal interface. The names of the snippets are as follows:

Name	Default Value
Portal/Lookup/Modal/Title	Lookup Records
Portal/Lookup/Modal/PrimaryButtonText	Select
Portal/Lookup/Modal/CancelButtonText	Cancel
Portal/Lookup/Modal/DismissButtonSrText	Close
Portal/Lookup/Modal/RemoveValueButtonText	Remove Value
Portal/Lookup/Modal/DefaultErrorMessage	We are sorry, an error has occurred.
Portal/Lookup/Modal/Grid/LoadingMessage	 Loading...
Portal/Lookup/Modal/Grid/ErrorMessage	Error completing request.
Portal/Lookup/Modal/Grid/AccessDeniedMessage	Access Denied. You do not have permissions to view these records.
Portal/Lookup/Modal/Grid/EmptyMessage	There are no records to display.
Portal/Lookup/Modal/Grid/ToggleFilterText	Toggle filter
Portal/Lookup/Modal/Grid/Search/PlaceholderText	Search
Portal/Lookup/Modal/Grid/Search/TooltipText	Use asterisk (*) wildcard character to search on partial text

← Managed Forms

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Adxstudio is the leading provider of web portal and application lifecycle management solutions built for Microsoft Dynamics® CRM, SharePoint and .NET platforms. Learn More
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