

Microsoft Dynamics CRM Rest

Last Modified on 03/18/2024 11:42 am EDT

Microsoft Dynamics CRM Rest

Microsoft Dynamics CRM Rest Connector

Authentication Prerequisites

The Microsoft Dynamics CRM Rest connector uses the **OAuth2** authentication workflow. Before you can authenticate an instance of the Microsoft Dynamics CRM Rest connector, you need the following:

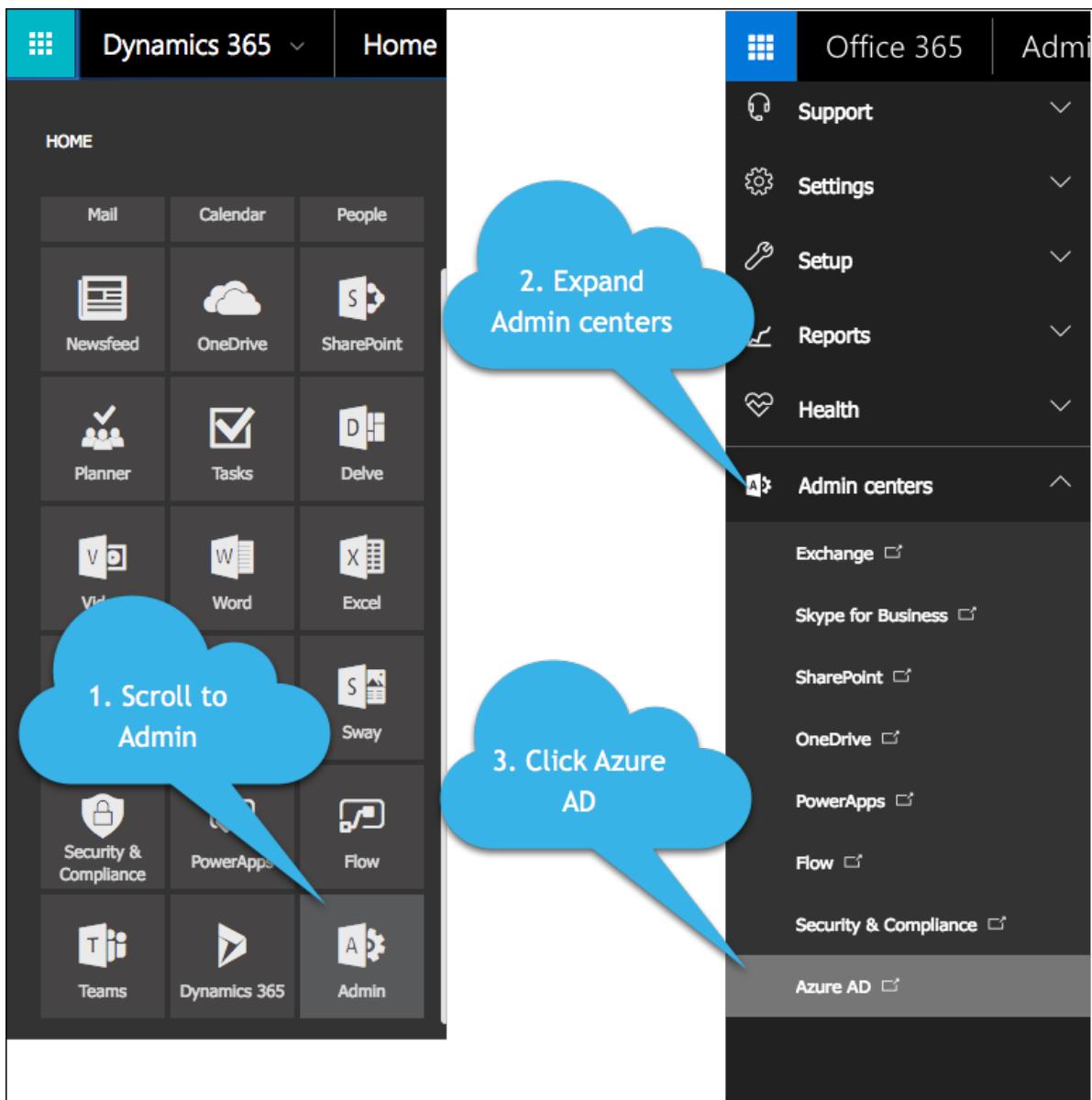
Provider Account, App, and Oauth information

To set up the Microsoft Dynamics CRM endpoint, you need to have an account and create or already have an app. Also, to authenticate with OAuth 2, you need to know the Client ID and keys for the app. If you use custom authentication when you provision a connector, you do not need the Client ID and keys for the app. Dynamics versions 2013-2015 are supported by the MS Dynamics 2015 SDK.

Note: Microsoft provides the most up-to-date and detailed setup instructions at [Microsoft Dynamics 365 Web API](#); legacy versions of the docs are available [here](#).

To create an app and acquire OAuth information:

1. Log in to your MS Dynamics account.
2. Navigate to the Admin Center, expand **Admin Centers**, and then click **Azure AD**.



3. Select your directory, and then click **Applications**.

DISPLAY NAME	USER NAME	SOURCED FROM
cloudelements@CloudElements1.onmicrosoft.com	cloudelements@CloudElements1.onmicrosoft.com	Microsoft Azure Active Directory
danieltester@CloudElements1.onmicrosoft.com	danieltester@CloudElements1.onmicrosoft.com	Microsoft Azure Active Directory

4. Select your application from the list, or create a new application (click  in the page footer).

5. Complete the configuration, paying close attention to the following for OAuth authentication:

- **keys**: Use the key value when you provision a connector using OAuth authentication as the **OAuth Client Secret in Azure AD** or `oauth.api.secret` .
- **CLIENT ID**: Used when you provision a connector using OAuth authentication as the **OAuth Client ID in Azure AD** or `oauth.api.key` .

- **permissions to other applications:** Permissions shown when you provision an instance with OAuth authentication.
6. **Note:** The key value for **OAuth Client Secret in Azure AD** appears only after you save the configuration and only one time. You will not be able to retrieve the key value later, so capture it immediately after you save.
7. Click  in the page footer.
8. Go to the **keys** section and capture the key value for **OAuth Client Secret in Azure AD**.

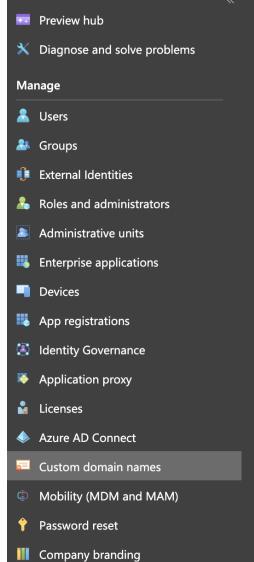
Required Authentication Parameters

You can authenticate a connector instance using the UI or via API calls. For detailed information on how to authenticate an instance, see our related documentation:

- [Authenticate a Connector Instance \(UI\)](#)
- [Authenticate a Connector Instance \(API\)](#)

To authenticate an instance of the Microsoft Dynamics CRM Rest connector, you will need the following parameters:

Parameter Name/UI Value	API Value/Key	Description	Source
OAuth API Key	oauth.api.key	The OAuth Client ID you were provided when creating the app.	
OAuth API Secret	oauth.api.secret	The OAuth Client Secret you were provided when creating the app.	

Parameter Name/UI Value	API Value/Key	Description	Source
Microsoft Dynamics CRM Tenant URL	site.url	The Microsoft Dynamics Tenant URL for your account.	<p>To retrieve your tenant URL:</p> <ol style="list-style-type: none"> 1. Navigate to portal.azure.com and sign in. 2. Under the Manage column, select Custom domain names.  <p>Your tenant URL is the primary domain listed.</p>

Sample Configuration JSON

```
"configuration": {
  "oauth.api.key": "f8yd98ys90983y98sygouegyaog",
  "oauth.api.secret": "22sdoiw08f673820h098aseoiugi32",
  "site.url": "http://mycoolsite.onmicrosoft.com"
}
```

Connector Fact Sheet and Reference

Authentication and Configuration Parameters

To see all authentication parameters for the Microsoft Dynamics CRM Rest connector, follow these steps:

1. Sign in to SAP Open Connectors and navigate to Connectors.
2. Hover over the card for a connector, and then click My Resources.



3. In the top navigation toolbar, click Setup.
4. From the Setup page, you can view a complete list of the connector's authentication and configuration parameters.

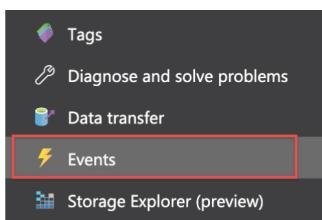
Events and Supported Resources

The Microsoft Dynamics CRM Rest connector supports events via webhooks. For detailed information about our Events framework and how to configure a connector instance with events, see our documentation:

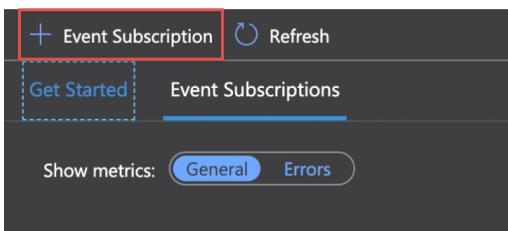
- [Authenticate a Connector Instance with Events \(UI\)](#)
- [Authenticate a Connector Instance with Events \(API\)](#)

To set up Events for Microsoft Dynamics CRM Rest:

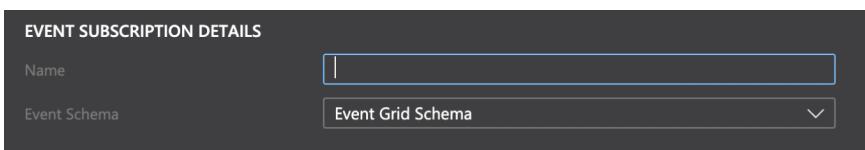
1. Login via portal.azure.com/#home.
2. On the navigation panel on the left, click **Events**.



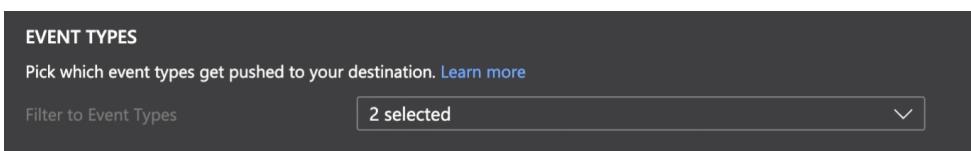
3. The Events console appears. Click **Event Subscription**.



4. Provide a name for your event.



5. Select an Event Type.



6. Select 'Web Hook' as your Endpoint Type from the drop down.

ENDPOINT DETAILS

Pick an event handler to receive your events. [Learn more](#)

Endpoint Type

Endpoint

- Once you select Web Hook as your endpoint type, click **Select an endpoint**.

Endpoint Type

Endpoint

- Head to the SAP Open Connectors Instance Creation page, create an instance and then toggle the Events button On.
- Once Events is enabled, copy the Webhook URL.

Event Configuration

Events Enabled

Event Type
webhook

Webhook URL

- Go back to the Azure Portal once again and paste this Webhook URL in the **Subscriber Endpoint** field.

Select Web Hook

Event Grid

Subscriber Endpoint *

- Click **Create** to create an event.

You have set up events for your instance via webhooks and will be able to see the new event you created on the Events console.

Tesd3e3321	WebHook
saiprakash	WebHook
heyiamtestingevents	WebHook

You can set up events for the following resources of the Microsoft Dynamics CRM Rest connector:

- accounts
- contacts
- incidents
- leads
- lists
- opportunities
- products
- systemUsers
- tasks
- appointments
- campaignActivities
- campaignResponses
- campaigns
- customerRelationships
- emails
- letters
- listMembers

- phoneCalls
- relationshipRoles
- salesOrders
- activities
- invoiceItems
- invoices
- knowledgeArticles
- quotationItems
- quotations
- salesorderItems

Queryable Endpoints

You can use [OCNQL](#) to query the following endpoints of the Microsoft Dynamics CRM Rest connector:

- GET /account-leads
- GET /accounts
- GET /activities
- GET /appointments
- GET /bulk/jobs
- GET /campaign-activities
- GET /campaign-items
- GET /campaign-responses
- GET /campaigns
- GET /contacts
- GET /customer-relationships
- GET /emails
- GET /incidents
- GET /invoice-items
- GET /invoices
- GET /knowledge-articles
- GET /leads
- GET /letters
- GET /list-members
- GET /lists
- GET /{objectName}
- GET /{objectName}/{objectId}/{childObjectName}
- GET /opportunities
- GET /products
- GET /quotation-items
- GET /quotations
- GET /relationship-roles
- GET /sales-orders
- GET /salesorder-items
- GET /system-users
- GET /tasks

Connector API Documentation

The base URL for all API requests is <https://api.openconnectors.us2.ext.hana.ondemand.com/elements/api-v2>.

Provider Documentation

- Microsoft Dynamics 365 documentation
- Microsoft Dynamics 365 API documentation

