Microsoft Dynamics 365 Finance and Operations API Provider Setup

Last Modified on 12/30/2019 8:41 pm EST

Overview

In order to create an instance of the Microsoft Dynamics 365 Finance and Operations connector, you must have the following:

- A Microsoft Azure Active Directory account
- A Microsoft Dynamics 365 Finance and Operations account

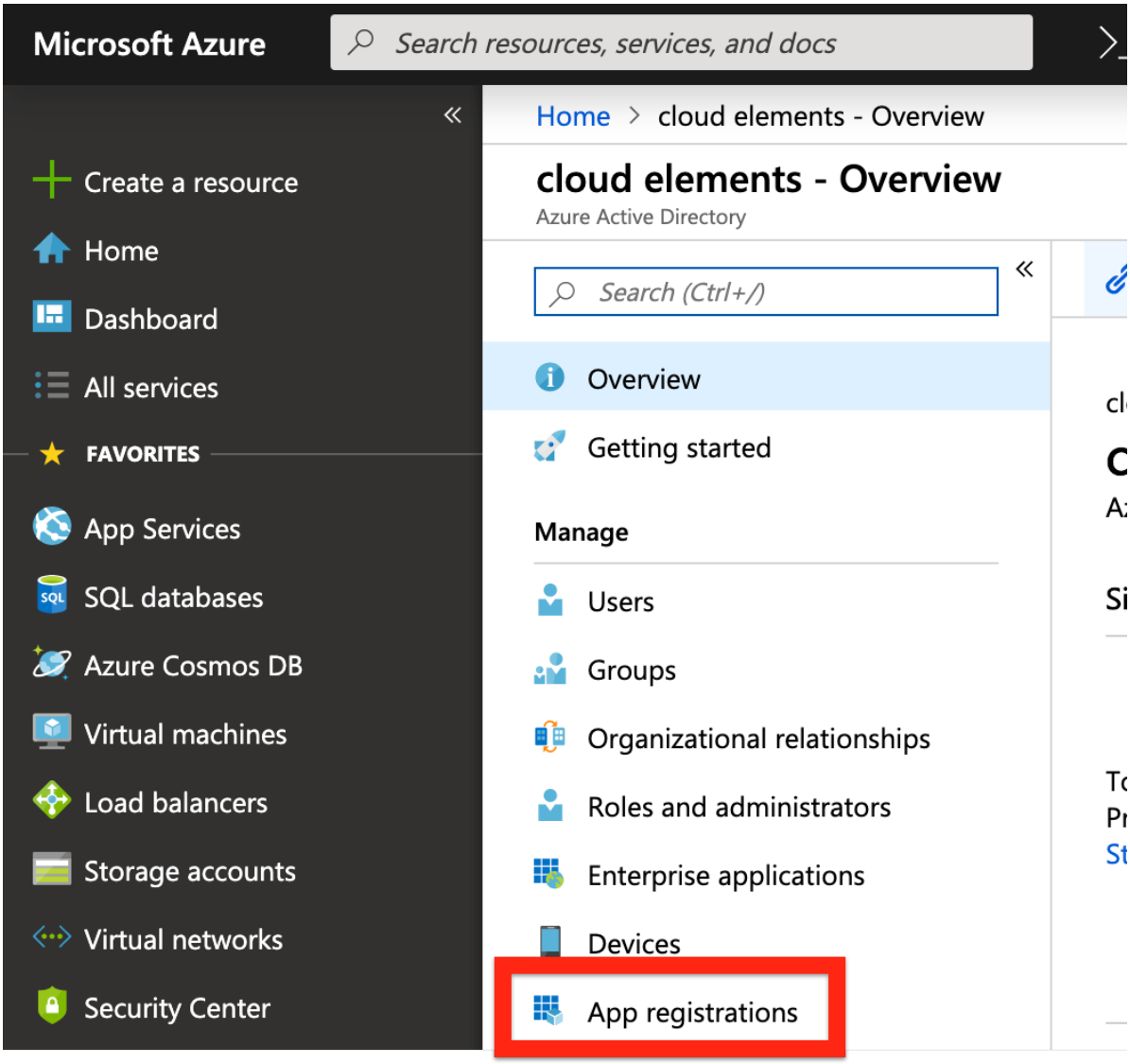
  Note: the Microsoft Dynamics 365 Finance and Operations trial does not provide API access. See Microsoft Dynamics 365 Finance and Operations Authenticate a Connector for additional information.

- A web application registered with both Azure Active Directory and Dynamics 365 Finance and Operations

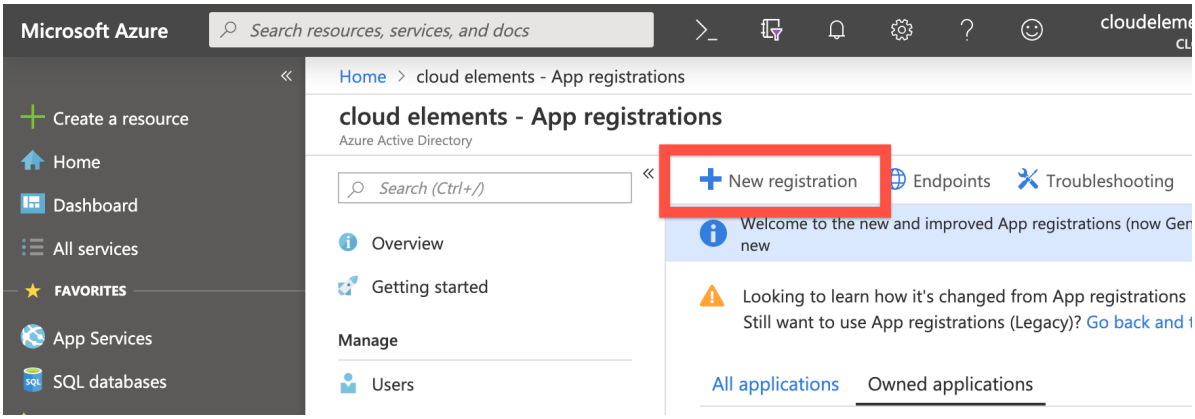
Registering a Web Application with Azure Active Directory

To register a new web application with Azure Active Directory, follow these steps:

1. In a web browser, navigate to the Azure Portal and sign in using your Azure Active Directory credentials.
2. From the left-hand navigation toolbar, select **Azure Active Directory** and then select **App registrations**.

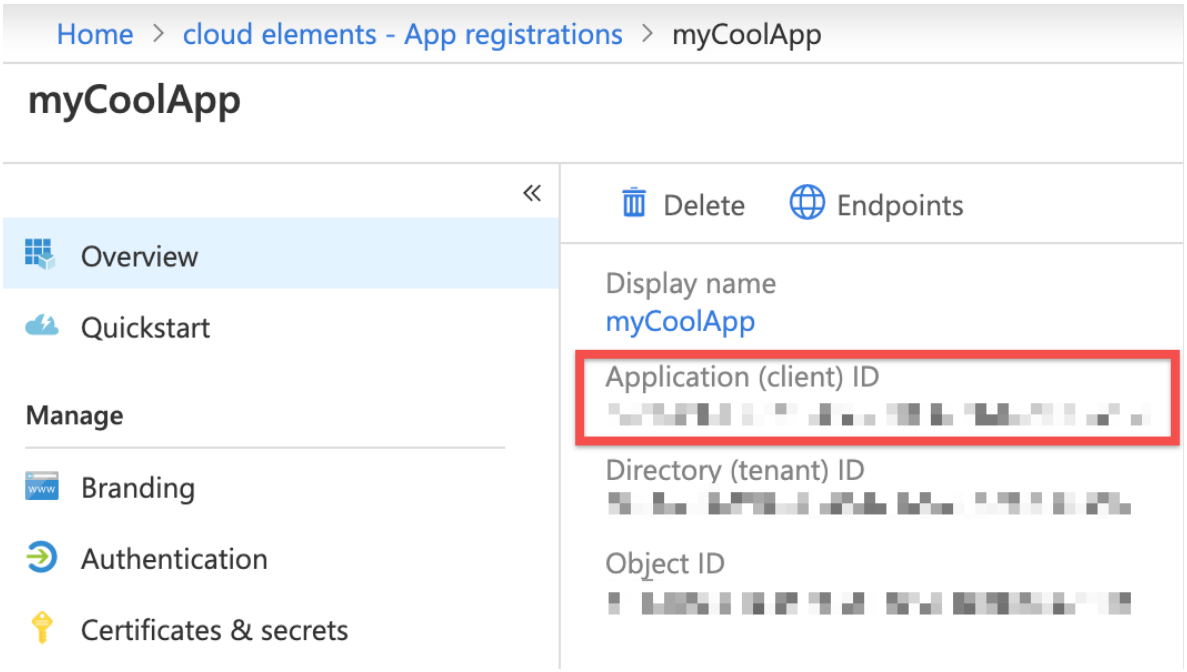


3. Select **New registration**.

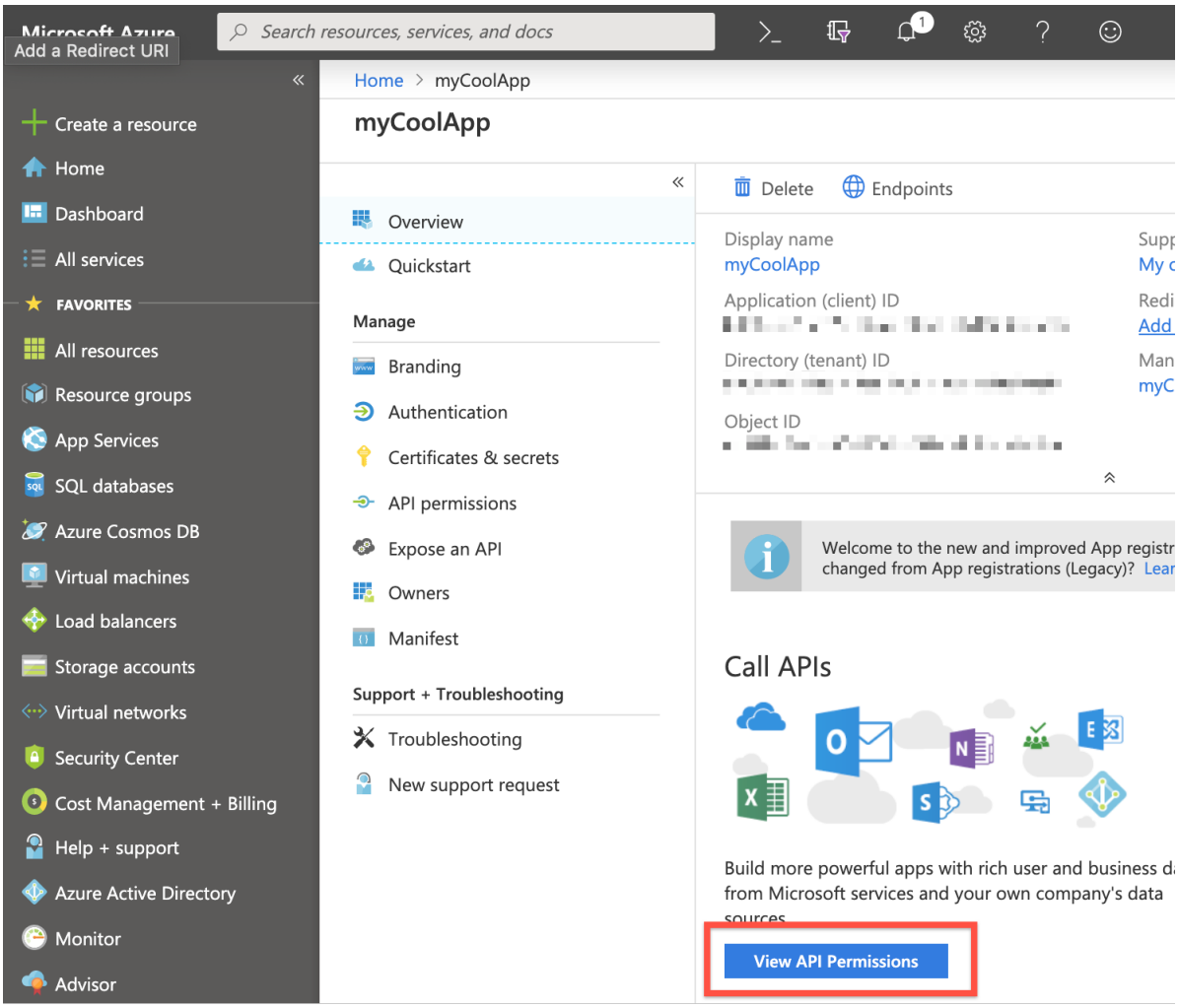


4. On the Register an application screen, enter the name and select the supported account types for your app.
5. In the Redirect URI (optional) field, enter `https://auth.cloudelements.io/oauth` and then click Register. For more information on the application registration process, see Microsoft's documentation.
6. After registering your new application, record the Application (client) ID as displayed in your application's overview page, as you will need to provide it during the authentication

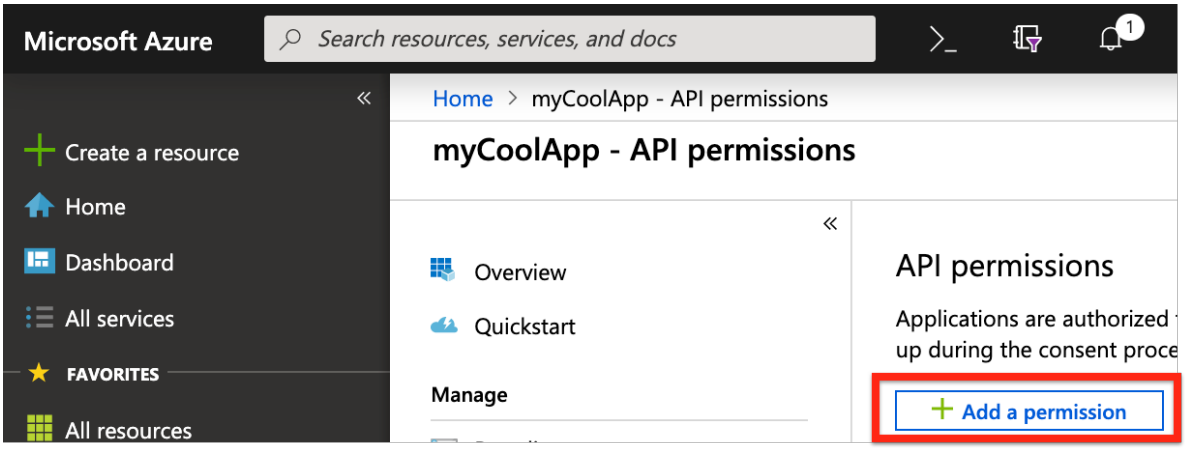
process.



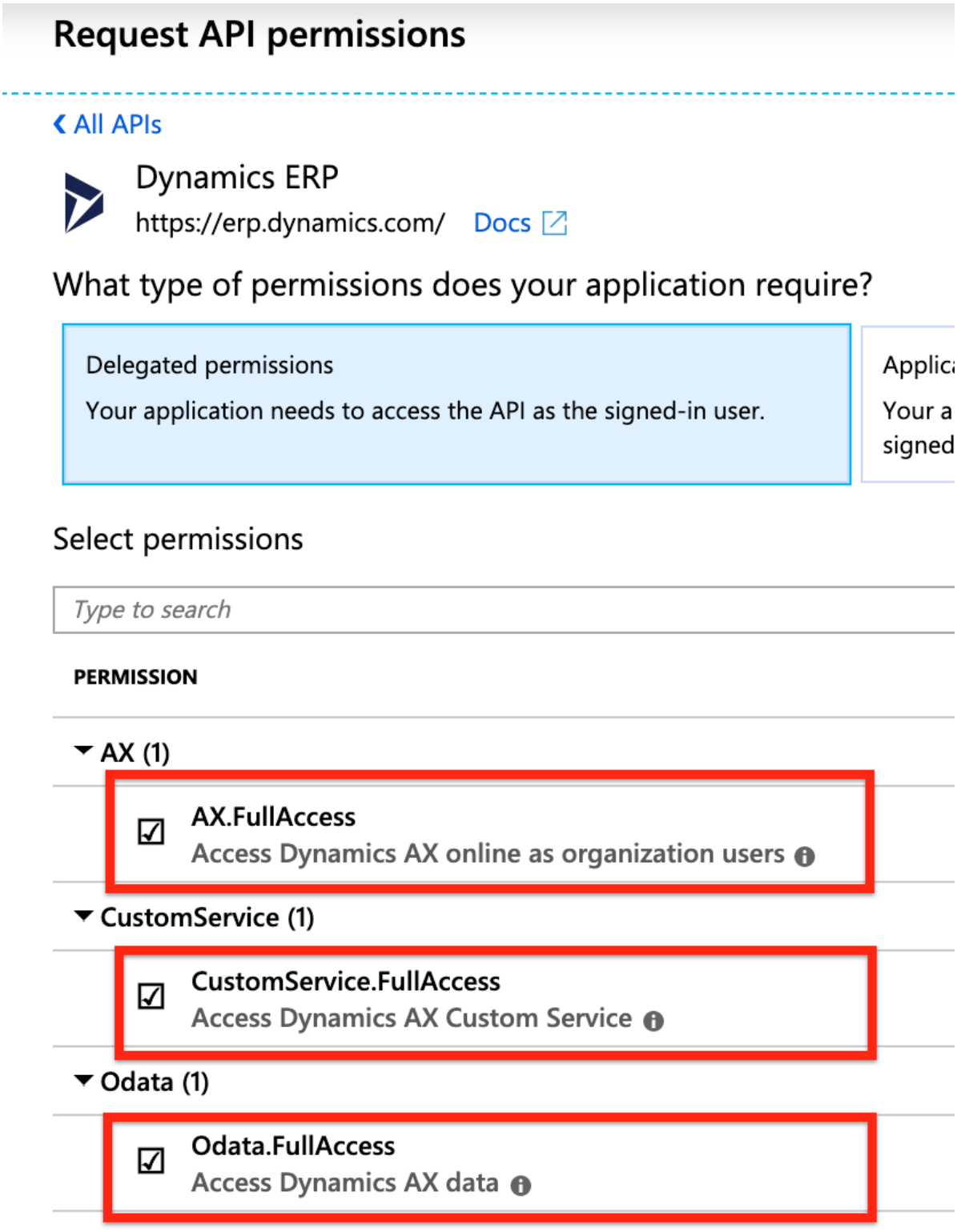
7. Under the **Call APIs** section, click the **View API Permissions** button.



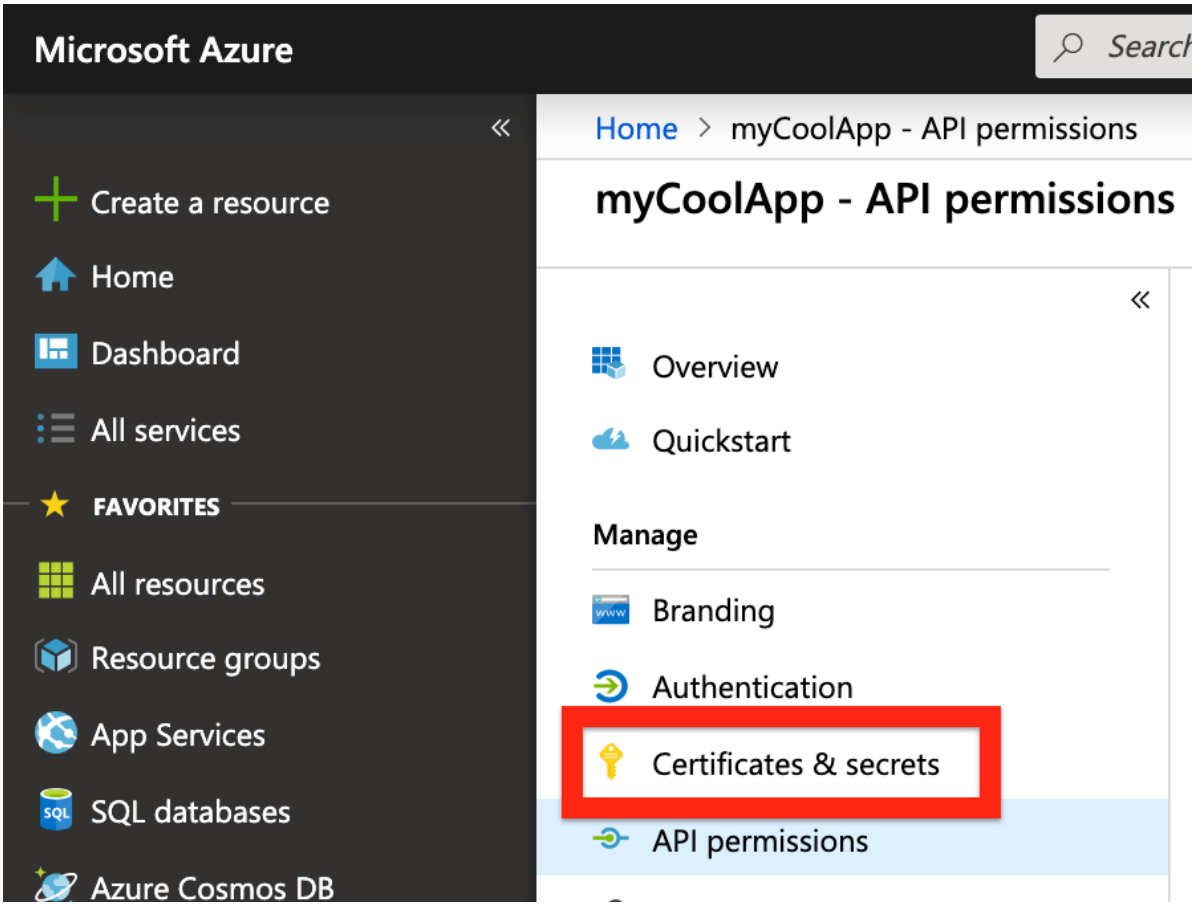
8. On the **API permissions** page, click the Add a permission button.



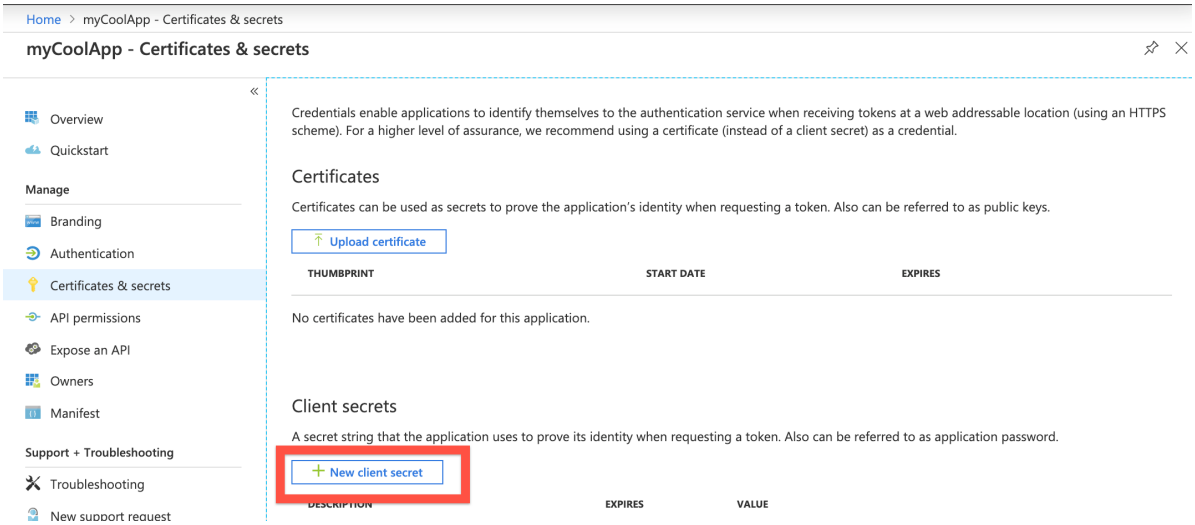
9. On the Request API permissions/Select an API page, select Dynamics ERP, and then enable the three delegated permissions: `AX.FullAccess`, `CustomService.FullAccess`, and `Odata.FullAccess`.



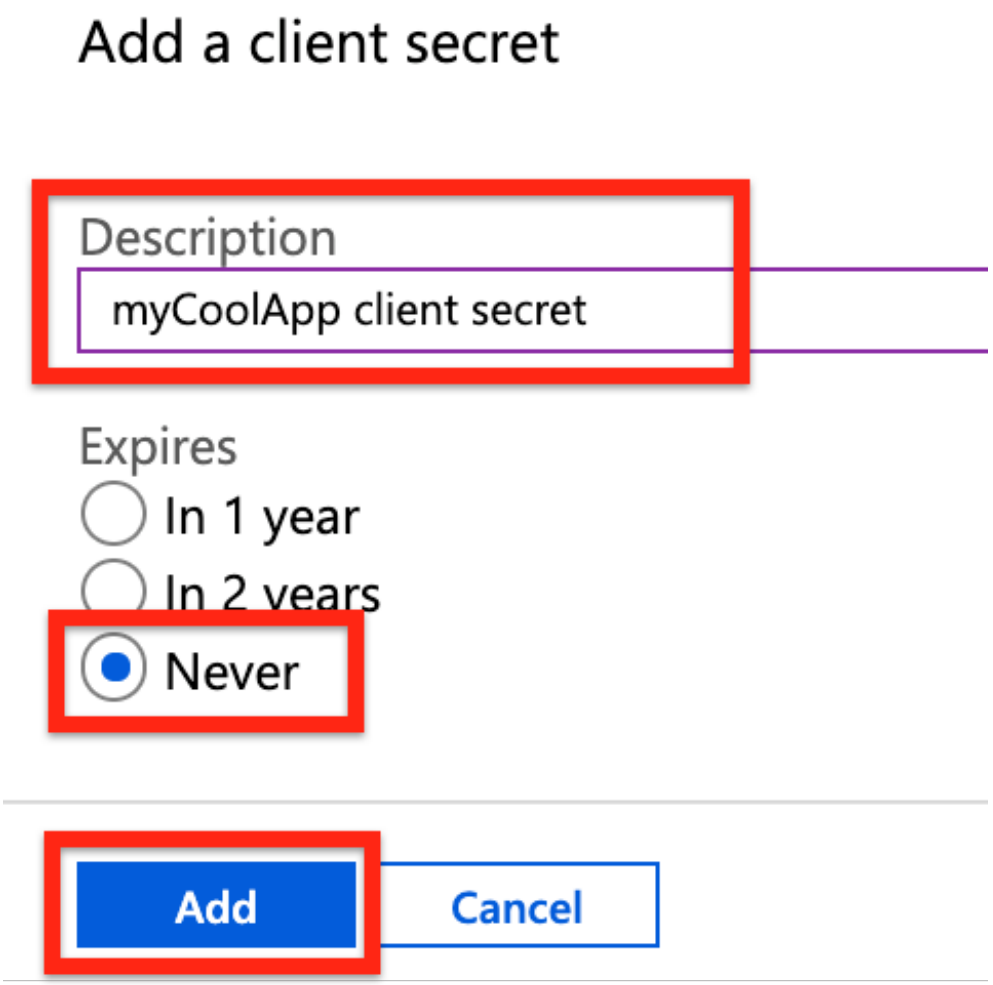
10. Click **Add permissions**.
11. Click the Update permissions button, and then click **Certificates & secrets**.



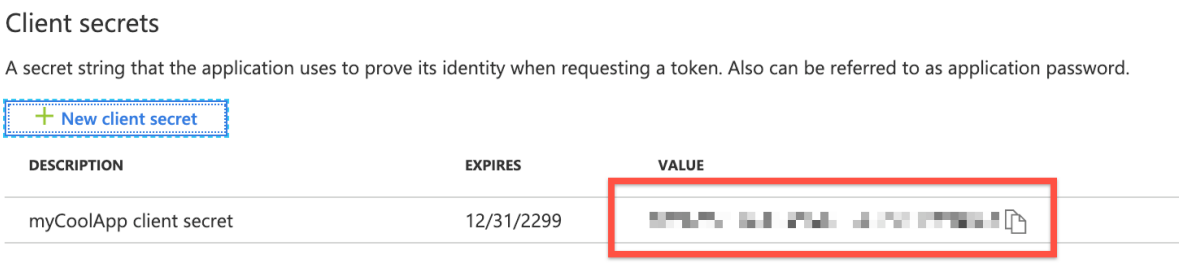
12. On the **Certificates & secrets** page, click the **New client secret** button.



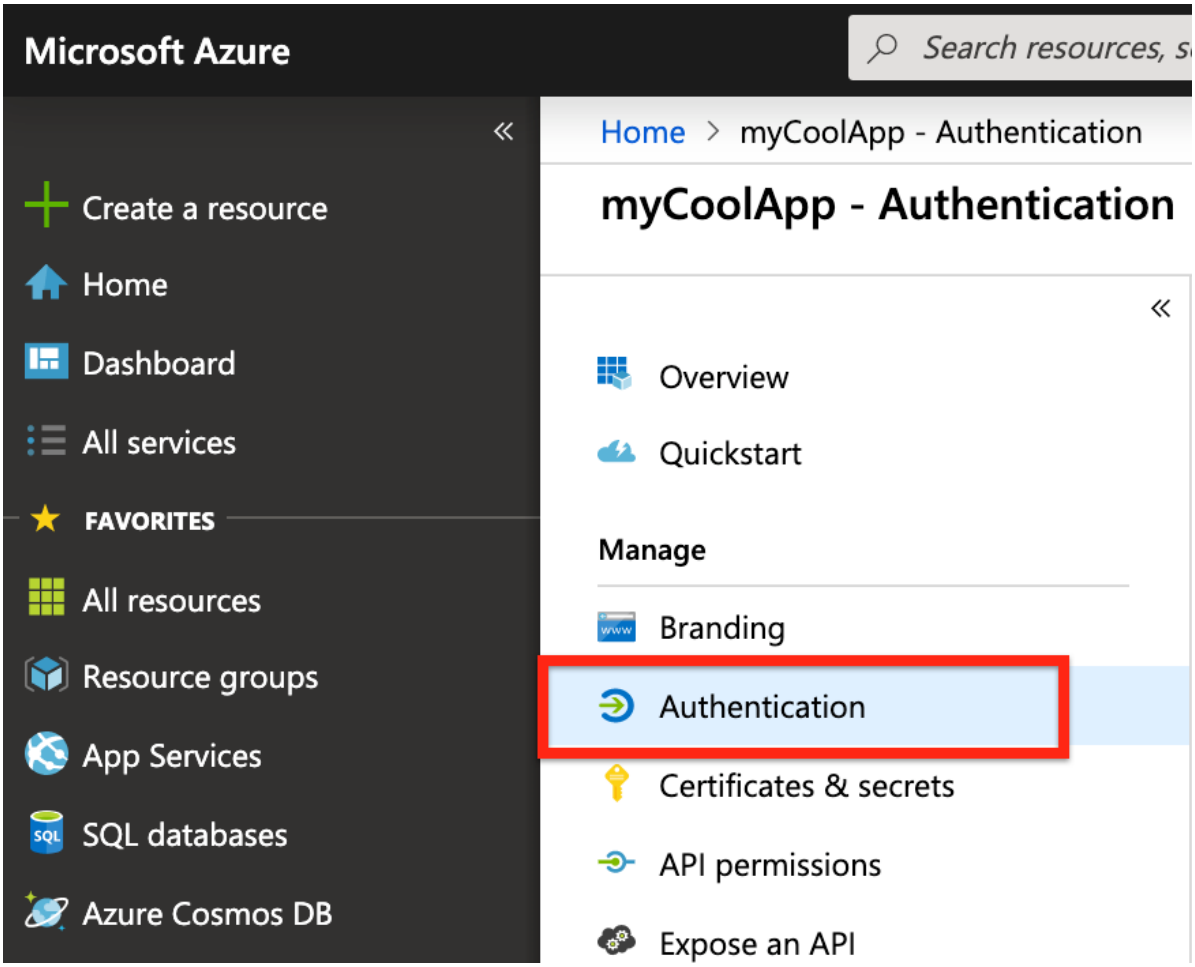
13. Enter a name for your client secret, select the Never option in the **Expires** column, and click **Add.**



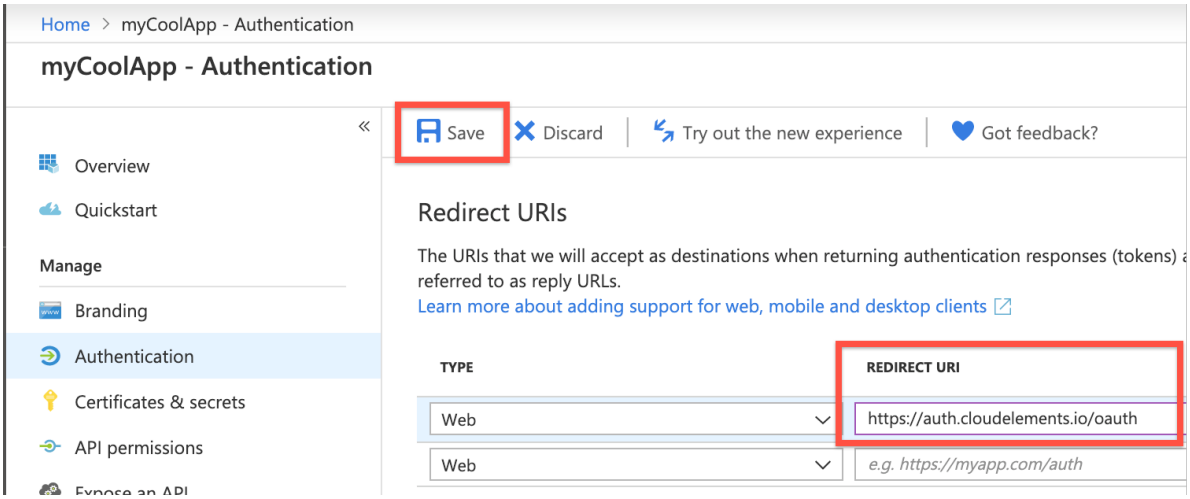
14. Record the newly created client secret value, as you can't retrieve it once you leave the page.



15. Click **Authentication**.



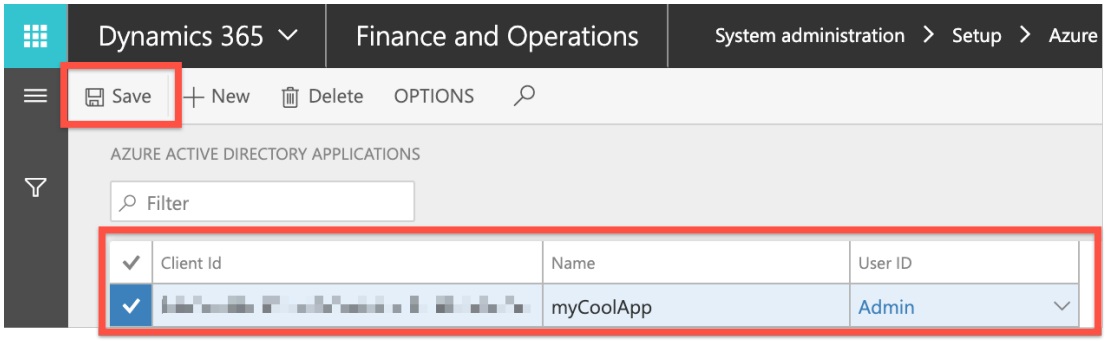
16. On the Authentication page, add `https://auth.cloudelements.io/oauth` to the Redirect URI field, and then click **Save**.



Registering the Azure Application with Dynamics 365 Finance and Operations

1. In a web browser, navigate to Dynamics 365 Finance and Operations.
2. Select System administration, then select Setup.
3. Select Azure Active Directory applications, and then click New.

4. Enter the following values in their respective fields:
    - **Client Id**: the application ID registered in Azure Active Directory, which you recorded during registering the application with Azure
    - **Name**: the name for the application
    - **User ID**: the ID of the service account user who will have the permissions for the application's operations
    - After entering the values, click **Save**.



After completing these steps, you should have this information recorded and available:

- Application (client) ID
- Client secret