Microsoft Dynamics 365 Finance and Operations API Provider Setup

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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.

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

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Azure Active Directory		from Microsoft services and your own company's data
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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.

Request API permissions

All APIs



Dynamics ERP https://erp.dynamics.com/ Docs [2]

What type of permissions does your application require?

Delegated permissions	Applica
Your application needs to access the API as the signed-in user.	

Select permissions

Type to search

PERMISSION



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.

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Authentication				
Certificates & secrets	THUMBPRINT	START DATE	EXPIRES	
API permissions	No certificates have been added for this	application.		
Sexpose an API				
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Support + Troubleshooting	A secret string that the application uses	to prove its identity when requesting a	token. Also can be referred to as application password.	
✗ Troubleshooting	+ New client secret			
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13. Enter a name for your client secret, select the Never option in the **Expires** column, and click **Add**.

Add a client secret



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.

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📣 Quickstart	Redirect URIs					
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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.

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- 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**.

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

- Application (client) ID
- Client secret