

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

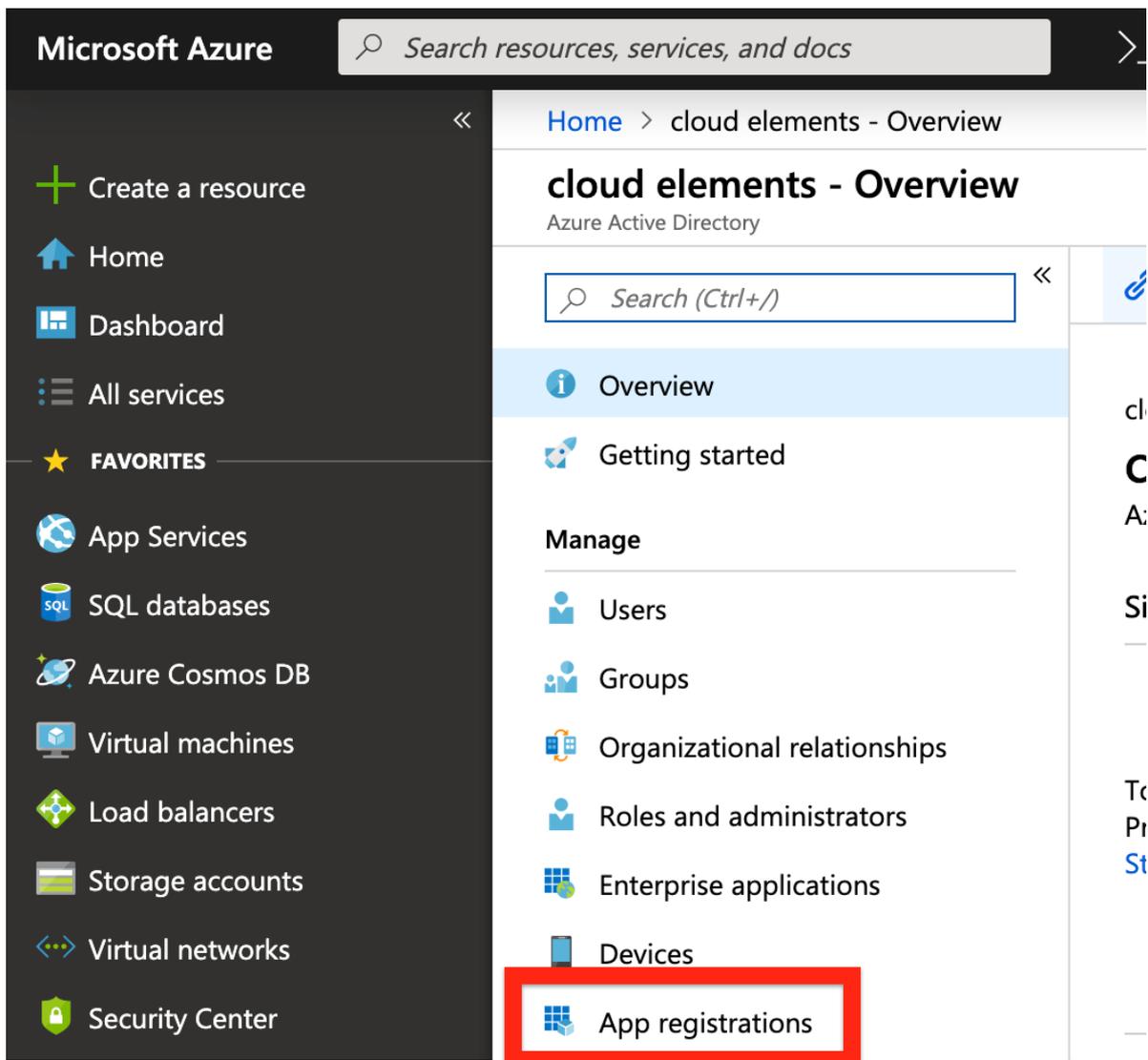
Note: the Microsoft Dynamics 365 Finance and Operations trial does not provide API access. See [Microsoft Dynamics 365 Finance and Operations Authenticate a Connector](#) for additional information.

- A web application registered with both [Azure Active Directory](#) and [Dynamics 365 Finance and Operations](#)

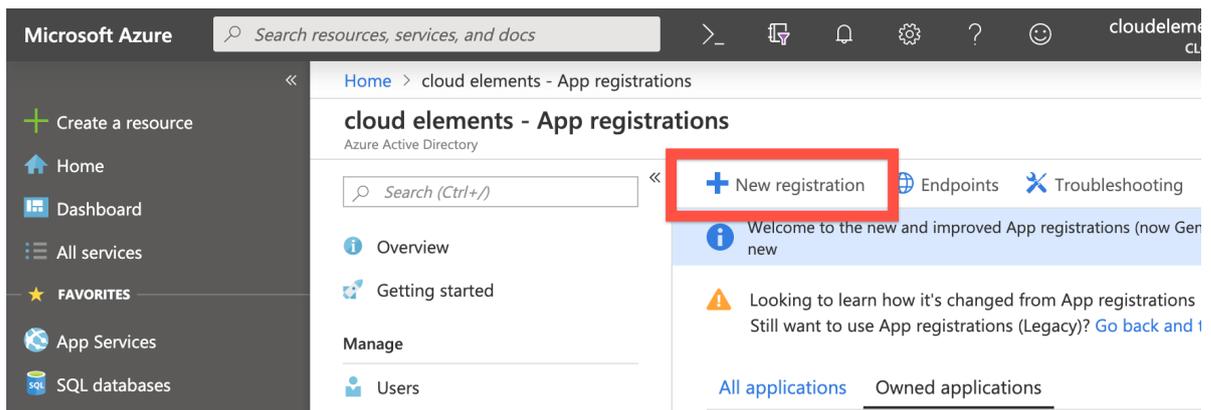
Registering a Web Application with Azure Active Directory

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**.

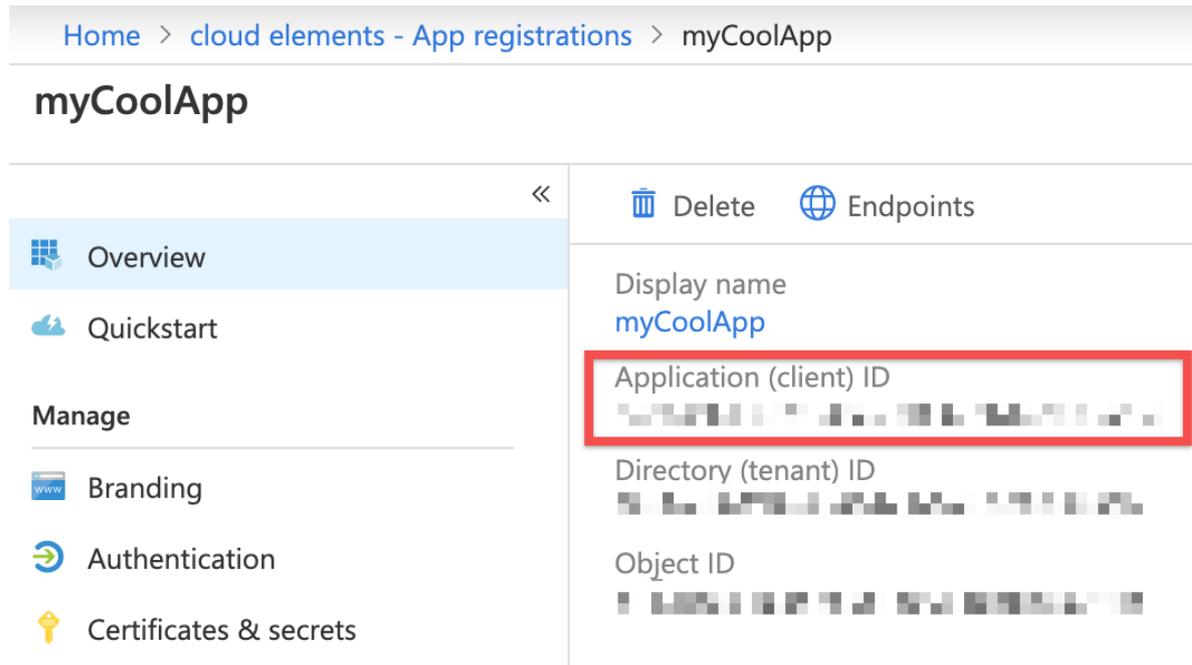


3. Select **New registration**.

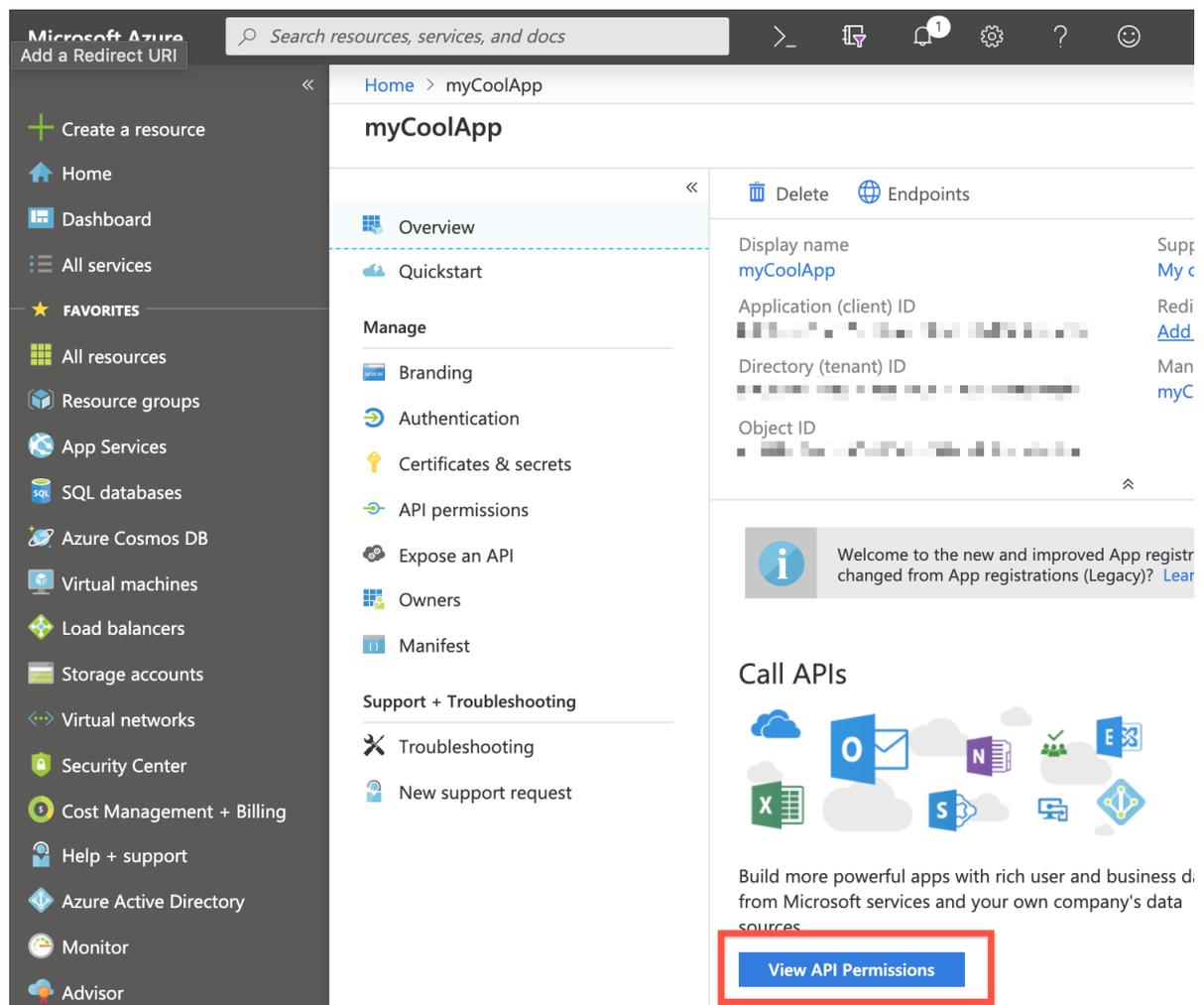


4. On the Register an application screen, enter the name and select the supported account types for your app.
5. In the Redirect URI (optional) field, enter `https://auth.cloudelements.io/oauth` and then click Register. For more information on the application registration process, see Microsoft's [documentation](#).
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

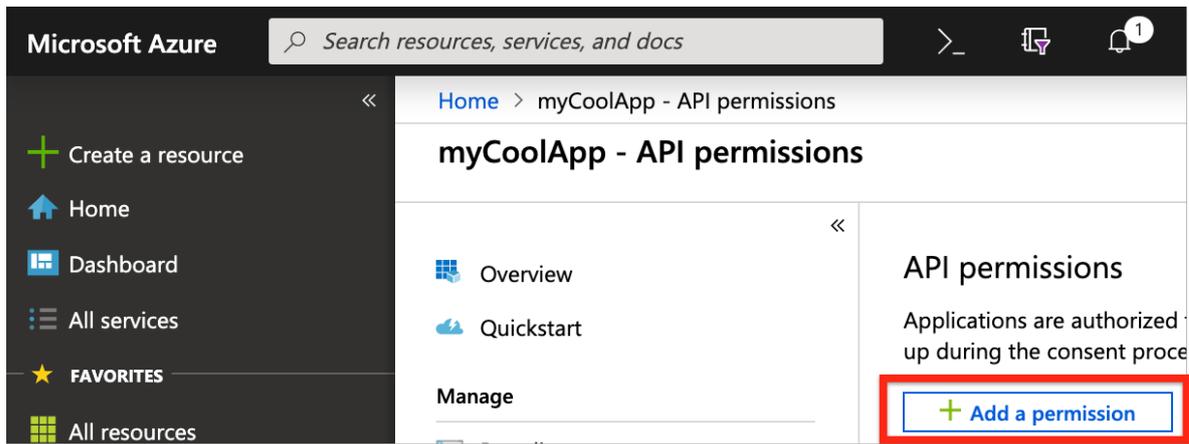
process.



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` .

Request API permissions

[← All APIs](#)



Dynamics ERP

<https://erp.dynamics.com/> [Docs](#)

What type of permissions does your application require?

Delegated permissions

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

Applic

Your a
signed

Select permissions

Type to search

PERMISSION

▼ AX (1)



AX.FullAccess

Access Dynamics AX online as organization users ⓘ

▼ CustomService (1)



CustomService.FullAccess

Access Dynamics AX Custom Service ⓘ

▼ Odata (1)

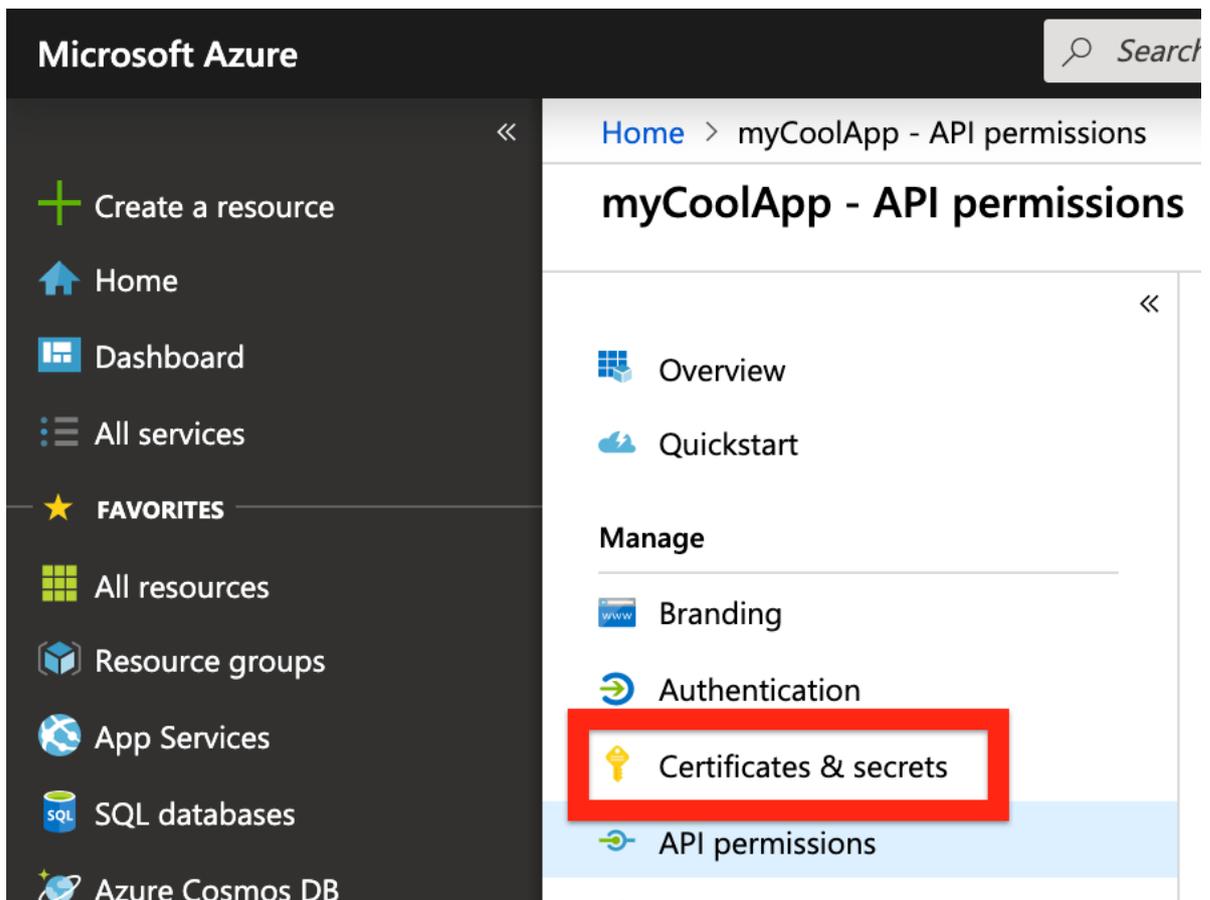


Odata.FullAccess

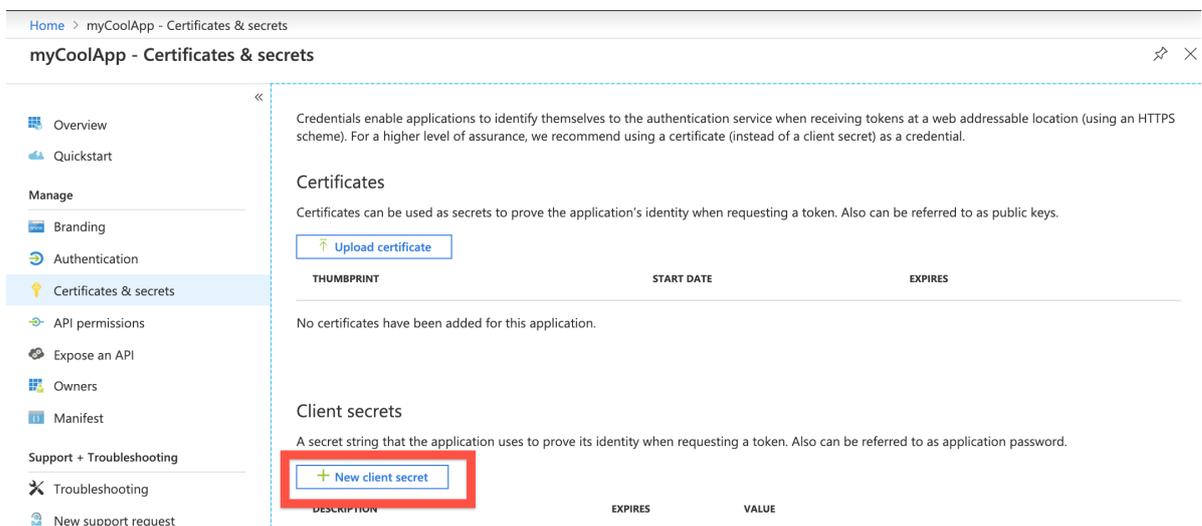
Access Dynamics AX data ⓘ

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**.

Add a client secret

Description

myCoolApp client secret

Expires

In 1 year

In 2 years

Never

Add Cancel

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

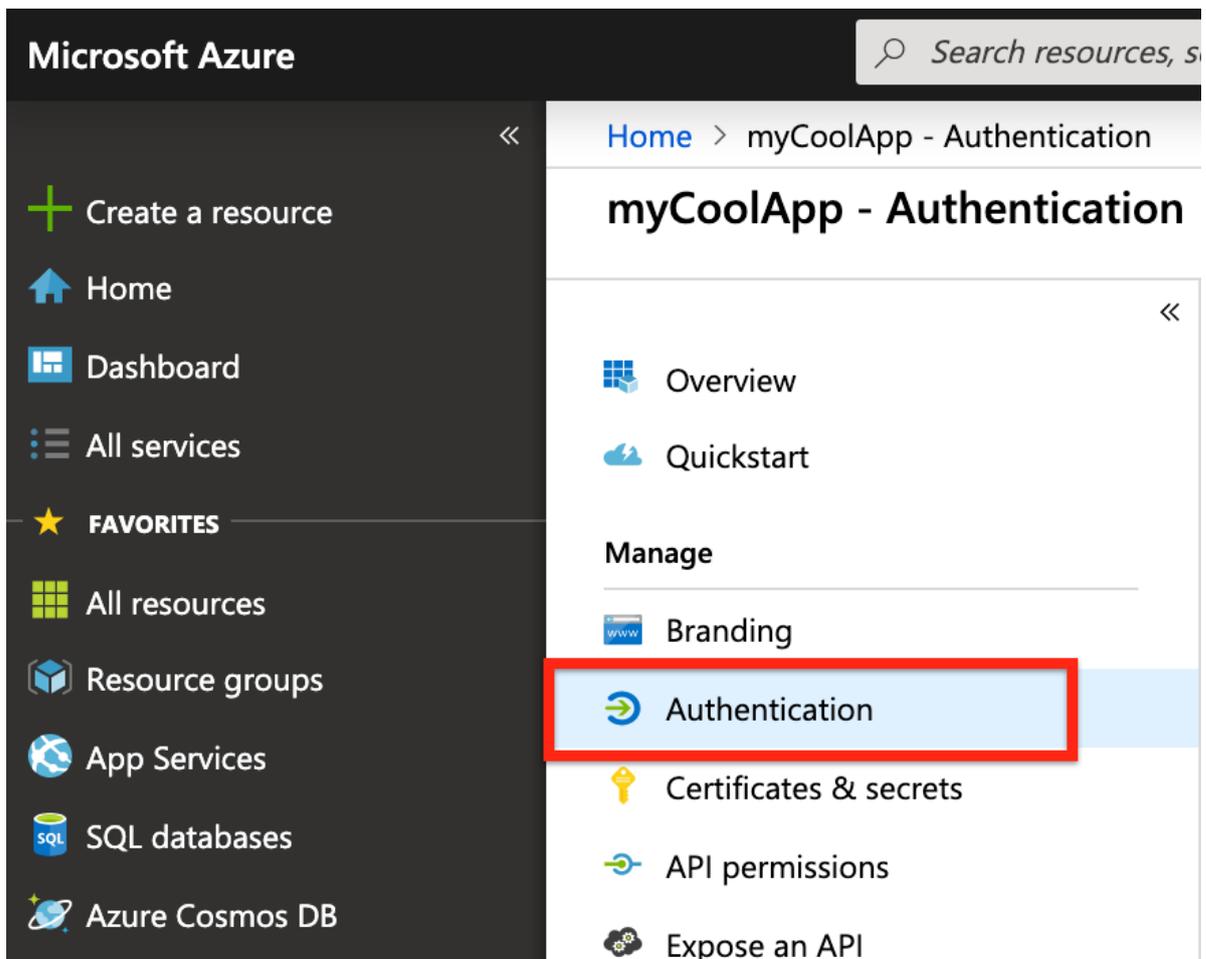
Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

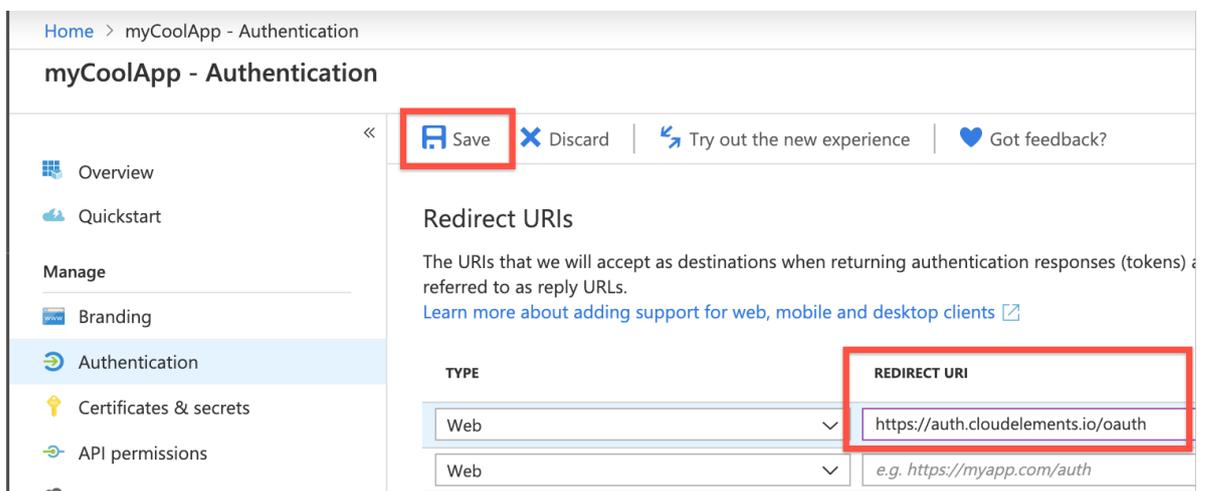
[+ New client secret](#)

DESCRIPTION	EXPIRES	VALUE
myCoolApp client secret	12/31/2299	

15. Click **Authentication**.



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



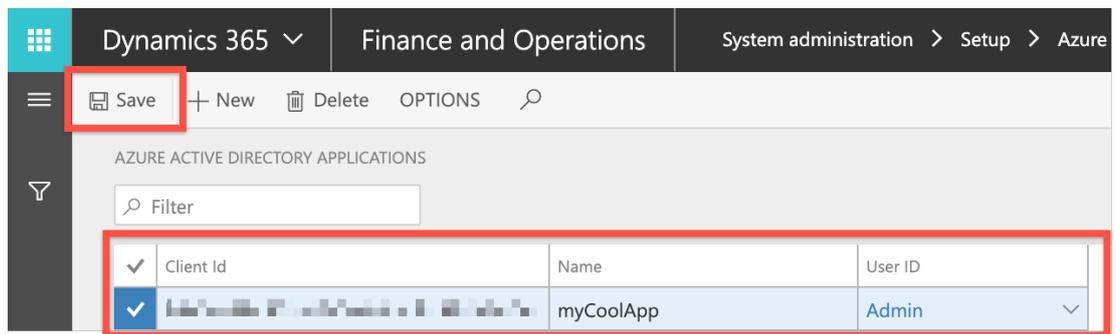
Registering the Azure Application with Dynamics 365 Finance and Operations

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