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Connection Dialog Documentation for Microsoft CRM 2015/2016 and Dynamics 365

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User Guide

(How to use Connection Dialog for Microsoft CRM 2015/2016 and Dynamics 365)

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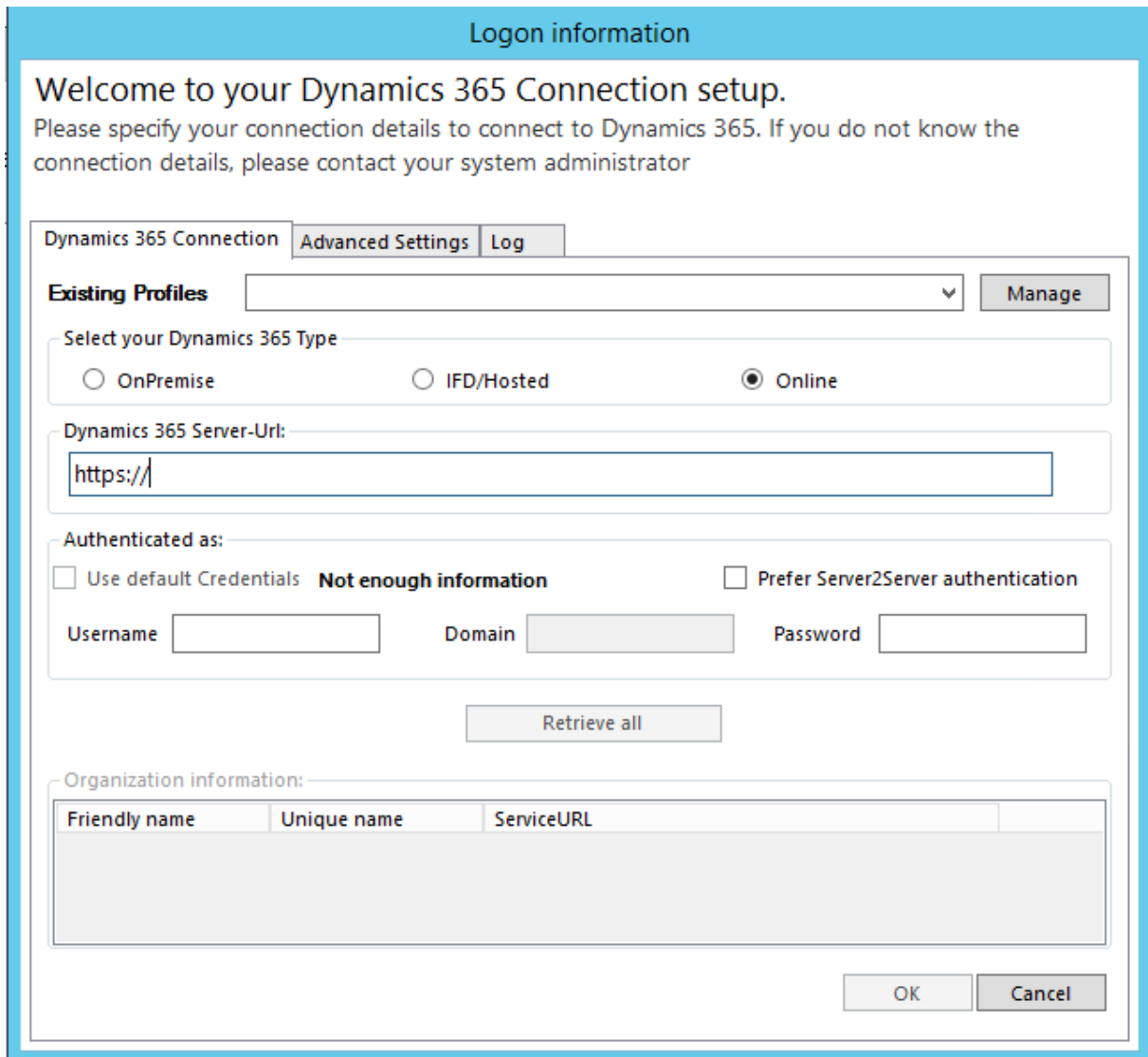
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1 General information

Our products require a connection to Microsoft Dynamics 365. Use the Dynamics 365 Connection Setup to connect to Dynamics 365 and to manage your connection(s).

You can select your Dynamics 365 Type, authenticate as a Dynamics 365 user, retrieve your (all available) organization(s), specify your settings and/or have a look at the log in this dialog.



Logon information

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | **Advanced Settings** | Log

Existing Profiles [Dropdown] [Manage]

Select your Dynamics 365 Type

OnPremise IFD/Hosted Online

Dynamics 365 Server-Url:
[https://]

Authenticated as:

Use default Credentials **Not enough information** Prefer Server2Server authentication

Username [] Domain [] Password []

[Retrieve all]

Organization information:

Friendly name	Unique name	ServiceURL

[OK] [Cancel]

Figure 1: Dynamics 365 Connection setup

2 The Dynamics 365Connection Tab

2.1 Existing profiles

If you have connected to this Dynamics 365 organization before you will find an existing profile. By selecting the profile, all information will be filled in automatically. You only should wait till the process is finished. Then you will notice this when one or more organizations are shown in the “Organization Information” section in the lower area of the dialog. The target organization will be highlighted in grey. Click on the **[OK]**-button to continue.

If this is a new installation or you want to connect to different organization follow the next steps. You can find further information about profiles in chapter [2.5 MANAGING PROFILES](#).

2.2 Provide connection information

Depending on the type of your Dynamics 365 organization you have to select between “OnPremise”, “IFD/Hosted” and “Online”.



Select your Dynamics 365 Type

OnPremise IFD/Hosted Online

Figure 2: Select your Dynamics 365 Type

1 ONPREMISE



Dynamics 365 Server-Url:

http://crm:5555

Authenticated as:

Use default Credentials **Integrated Security**

Username Domain Password

Retrieve all

Figure 3: Select Dynamics 365 Type – onPremise



Per default, the Dynamics 365 Server-Url is empty and you must enter your Dynamics Server-Url.

On-premise Dynamics 365 is installed and run on computers on your premises, not at a remote facility.

The above screenshot displays an example of a correctly filled Dynamics 365 Server-URL. In our example, we use the port 5555(1). If you do not have a port, the system uses the standard port :80 in the background.

Standard Dynamics 365 most likely run with http:// protocol. If you check the default credentials check box, Microsoft Windows will use the Integrated Security and log you in with your user login **(2)**.

If you uncheck the default credentials check box, you must enter your username, domain and your password manually.

In case you have one, please do not forget to enter the port and please make sure that you use the right protocol (http:// or https://)!

2 IFD/HOSTED

If IFD hosted, your Dynamics 365 is connected via ADFS, a software component that provides users with single sign-on access to systems and/or applications located across organizational boundaries. The login via Integrated Security ("Use default Credentials" – option) is not possible in combination with IFD/Hosted.

There are two options to enter your credentials in case you use an IFD hosted Dynamics 365:

1 Enter your **username and your domain extra**.



Depending on your IFD Host, it could happen, that you are provided with an error message when you enter your credentials this way. In that case, please, enter them the way it is shown in option 2.

Select your Dynamics 365 Type

OnPremise IFD/Hosted Online

Dynamics 365 Server-Url:

✓

Authenticated as:

Use default Credentials **yourdomain\youruser** 1

Username Domain Password

Figure 4: IFD/Hosted – username and domain extra

2 Enter **your username + @ + your domain** in the field [Username] and leave the field [Domain] blank. Do not forget to enter the password!

Select your Dynamics 365 Type

OnPremise IFD/Hosted Online

Dynamics 365 Server-Url:

✓

Authenticated as:

Use default Credentials **youruser@yourdomain** 2

Username Domain Password

Figure 5: IFD/Hosted – Username and domain together



Do not forget to enter the port (if you use one) and pay attention to the protocol! IFD solutions are very often connected with https:// protocol! Basically, you could also enter http:// protocol, but the Dynamics 365 connection would not work!

3 ONLINE

If your Dynamics 365 is an online hosted version (e.g. connected via Microsoft Office 365), the data center is preset 1.



It is not possible to use http:// protocol in this case is not possible to insert a domain in the field [Domain]! You must use the combination of Username + @ + Domain in the field [Username] 2 and you cannot use the Integrated Security option!

Select your Dynamics 365 Type

OnPremise IFD/Hosted Online

Dynamics 365 Server-Url:

1 ✓

Authenticated as:

Use default Credentials **youruser@crm4.dynamics.com** 2 Prefer Server2Server authentication

Username Domain Password

Figure 6: Online

2.3 Retrieve organization(s)

If your credentials were entered properly, you can proceed with the next step:

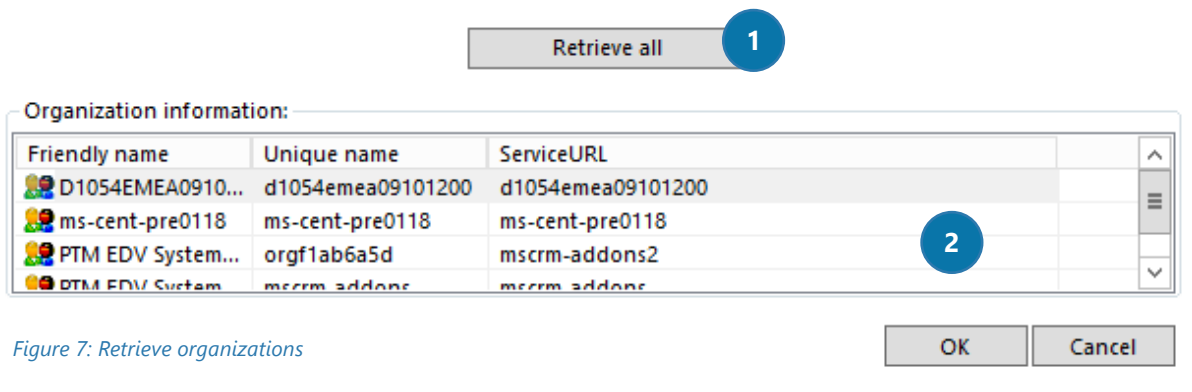


Figure 7: Retrieve organizations

Select your organization:

1 RETRIEVE ALL ORGANIZATIONS

Get a list of all available organizations by clicking on the **[Retrieve all]**-button.

2 ORGANIZATION INFORMATION

Listing of all organizations accessible to the given user.

Please note: Usually you will only see one organization.

Select the organization you want to connect to and hit the **[OK]**-button.

2.4 Common logon errors

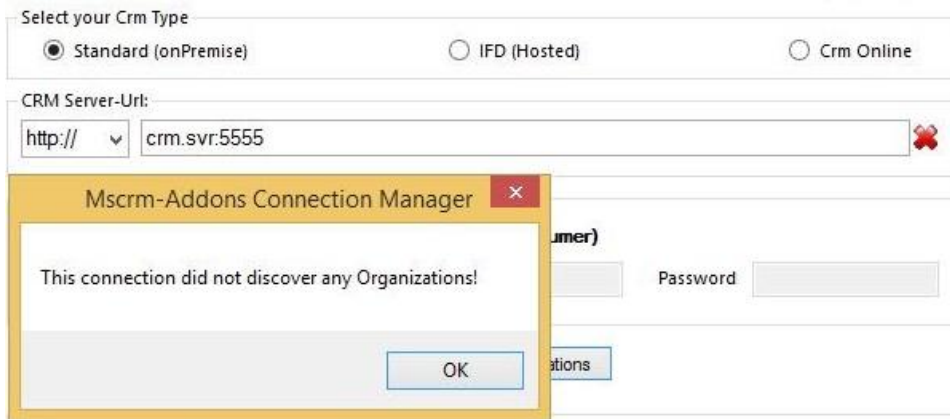


Figure 8: Logon errors #1

To solve this issue, please recheck your Dynamics 365 Server-URL and the protocol. Should the error persist, please navigate to the "Log" tab and mail the whole content to our support team.

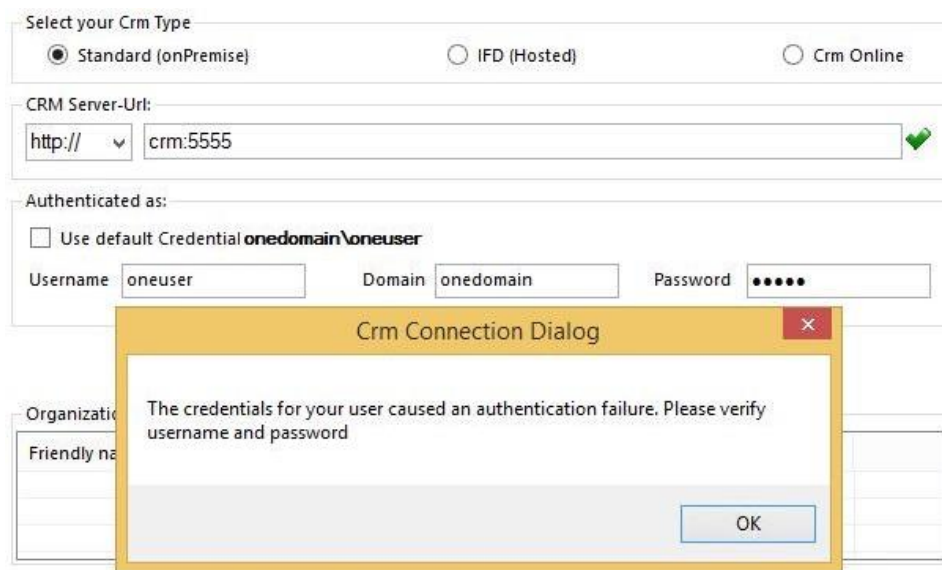


Figure 9: Logon errors #2

To solve this issue, please recheck your credentials. Should the error persist, please contact our support team.

2.5 Managing profiles



Figure 10: Managing Profiles

- 1 Select a profile by opening the drop-down menu. If you had more than one Dynamics 365 profile, you could switch between your profiles here. Per default, the drop-down menu is empty.

Please note: the average Dynamics 365 user has most likely only one profile.

- 2 Clicking on the **[Manage]**-button, will open a new window in which your Dynamics 365 profiles can be managed. Per default, the window is empty. As soon as you have at least one available profile, you can manage this profile here (for example rename or delete a profile).

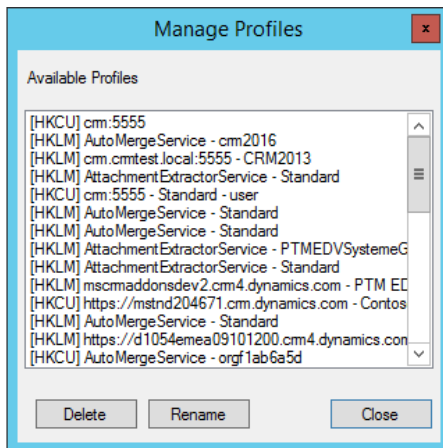


Figure 11: Delete/Rename Profiles

Please note: Per default, the window is empty. In our example, we have used some random profiles for illustration purposes.

3 The Advanced Settings Tab

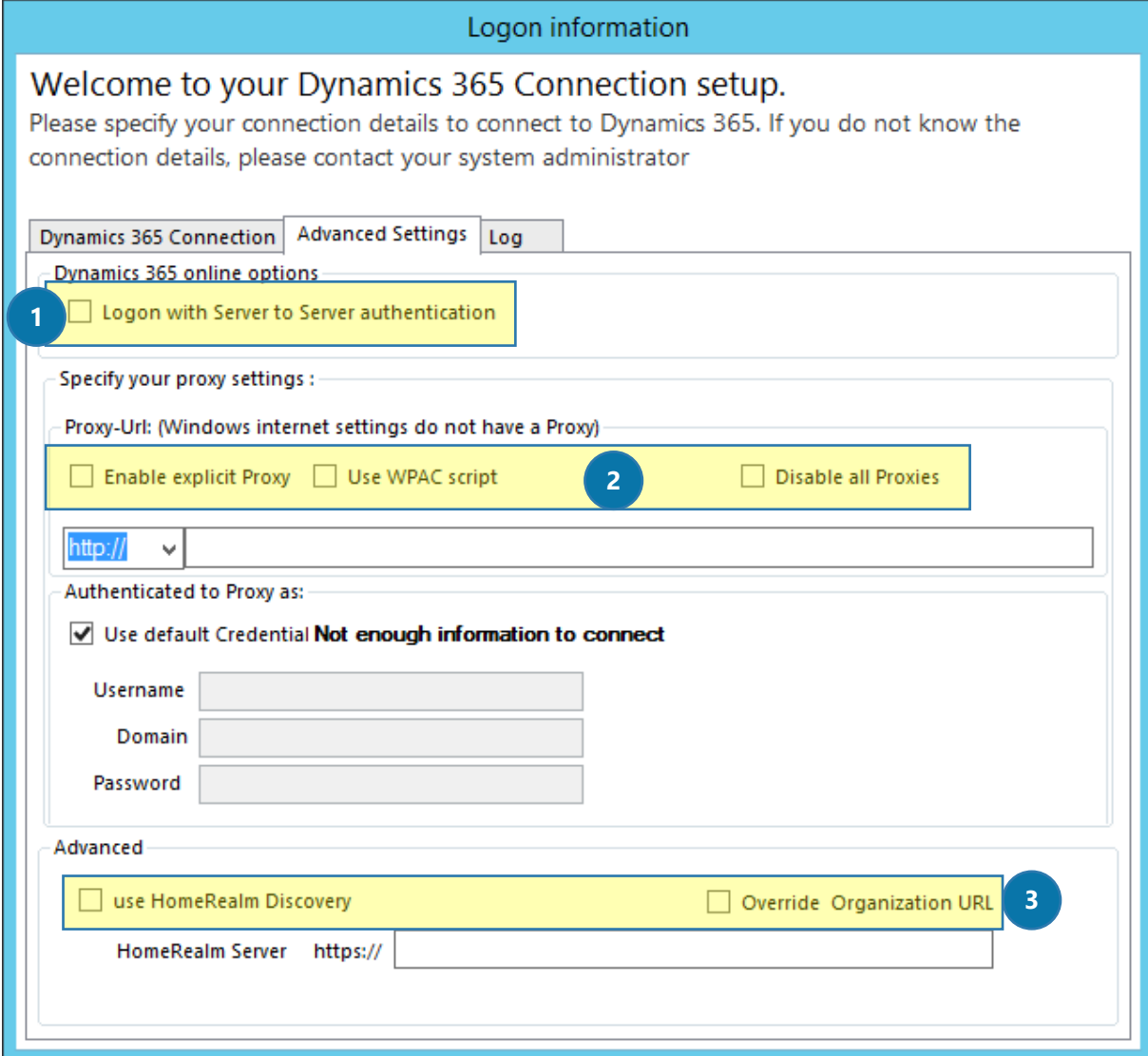


Figure 12: Advanced Settings

1 DYNAMICS 365 ONLINE OPTIONS

Enable this option, if you still use a Live ID to logon to Dynamics 365 Online.

2 SPECIFY YOUR PROXY SETTINGS

Per default, the settings of the system are used.

Enable explicit Proxy

Check this checkbox only if you want to explicitly use the specified proxy for the Dynamics 365 connection.

Use WPAC script

The connection tries to load the WPAC script from the given URL, when accessing Dynamics 365.

Disable all Proxies

Check this checkbox to disable all proxies for the Dynamics 365 connection.

3 ADVANCED

Override Organization URL

Check this checkbox if you use load balanced environments. This will ensure that the connection dialog uses the Dynamics 365 URL specified on the general tab. Instead of using the URL returned by the disco service. Ensure you are using the actual node name instead of the load balancer URL on the general tab.

Use HomeRealm Discovery

If you check this box, make sure that you enter the server with the port in the general tab!

4 The Log Tab

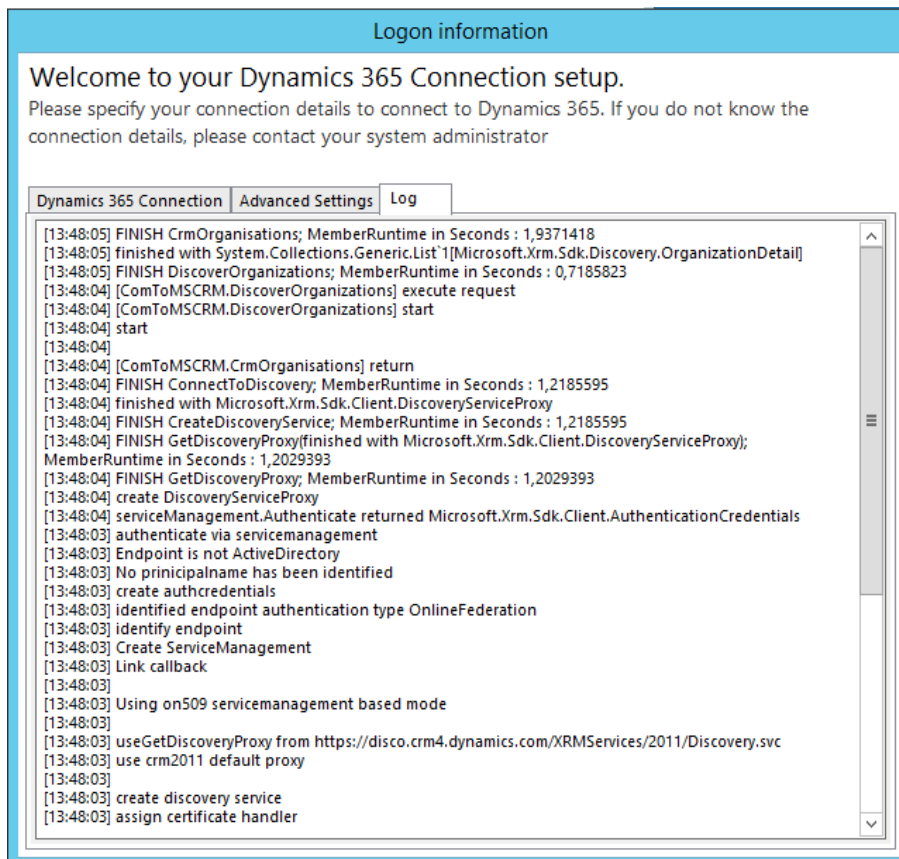


Figure 13: The Log Tab

The log-tab provides you with a detailed log of your actions in real time, so you can easily keep track of them here.

If you find an error that you cannot solve by yourself, please copy the content of the log tab and mail it to our support.

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6 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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