
用户帮助

我们的服务

我们提供 Microsoft Dynamics 365（以下简称 Dynamics 365）与微信公众号的集成服务，使拥有公众号的 Dynamics 365 使用者可以在 Dynamics 365 中完成微信公众号的管理功能。

什么是 Dynamics 365？

Dynamics 365 是微软面向用户提供的一套综合解决方案，包括销售、市场营销、服务、运营和商务等众多功能，在全球范围内拥有广泛的用户。

什么是微信及微信公众号？

微信是由腾讯（Tencent）公司推出的即时通讯软件，也是中国最广为使用的即时通讯软件。微信公众号是腾讯为开发者或商家提供的应用账号，通过该账号，商家可以实现与特定群体的文字、图片、语音、视频的全方位沟通、互动。形成了一种主流的线上微信互动营销方式。

为什么需要使用我们的服务？

使用我们的服务，可以在 Dynamics 365 中使用公众号的功能，与用户和客户进行互动并为其提供服务。这种互动可以弥补 Dynamics 365 大陆版没有 Marketing 组件的缺憾，同时也弥补了 Dynamics 365 与公众号后台之间的数据鸿沟——你的聊天记录都会被存储在 Dynamics 365 系统中。

为什么不直接在 Dynamics 365 中使用自有的公众号开发者 ID，而需要选择我们的第三方服务？

微信公众号需要设置 IP 地址白名单才可以被访问，而 Dynamics 365 的 IP 地址是一个很大的范围，尤其是使用 Office 365 认证时还需要额外增加很多 IP 地址（<https://support.microsoft.com/en-us/help/2728473/microsoft-dynamics-crm-online-ip-address-ranges>）。而公众号所能允许的 IP 地址白名单数量远远小于 Dynamics 365 所需要开放的数量。使用我们的服务，将会避免开启如此之多的 IP 地址白名单的问题，我们会将我们的服务器地址做好设置，对您而言，服务是开箱即用的。

我们如何做到连通 Dynamics 365 和微信的？

腾讯公司提供了一个名为“微信公众平台-第三方平台”（3rd-party platform）的服务。我们是一家经过了腾讯认证的第三方平台，也是唯一一家接入 Dynamics 365 应用的第三方平台。我们的解决方案可以调用微信的 API 来操作您的公众号

——当然，这需要经过您的授权。同时我们的解决方案也可以通过 Dynamics 365 的 API 接口来操作您的 Dynamics 365 功能——同样，这也需要您的授权，并且我们所使用的账号也会被您在 Dynamics 365 中的权限设置所约束。您所需要做的，就是为我们提供两者的授权，剩下的事情就交给我们的解决方案来处理了。

如何接入我们的服务？

如上所述，您需要提供微信公众号的管理授权，以及 Dynamics 365 的账号授权。您的 Dynamics 365 环境中需要安装我们发布于 App Source 上的 Solution，这就是您所需要做的全部——之后就可以在 Solution 所提供的界面上进行简单的操作来完成公众号的管理了。

我们的微信公众号授权安全吗？

我们使用的是腾讯官方提供的管理 API 来实现代管功能的，所有的通讯都按照腾讯设计的方式经过了严格的加密。您的授权也可以精确到每一个 API 的权限，您可以修改权限使我们仅可访问您所愿意开放的功能。并且可以随时关闭您的授权。

我们的 Dynamics 365 授权安全吗？

我们将使用 AAD 认证的 Application User 访问您的 Dynamics 365 实例。该用户可以被授予适当的角色以最小权限完成其任务（实际上我们预设了一个这样的角色），您可以在您的实例里随时查看角色的设定或者修改该账号的授权。在您的视角下，这个访问账号就像普通用户一样——它甚至不需要占用你的 license 数量。同样的，我们之间的通讯也经过了微软的加密保护，牢不可破。

如何完成微信公众号授权？

您在安装了我们的应用后，可以打开 Dynamics 365 上方导航栏的 Wechat marketing，选择左下角的“设置（Setting）”，点击“开通服务（Start To Use）”，阅读并选择一种适合你身份的授权按钮。在页面跳转至授权页时，将要求您输入您的原始 ID，您的原始 ID 可以在公众号后台（<https://mp.weixin.qq.com/cgi-bin/home>）--设置 - 原始 Id 中获取。输入原始 ID 后，您将跳转至微信官方授权页面，您只需要点击确认授权按钮。然后页面将跳转回授权信息显示界面，显示您的 AppId，设置令牌，部署服务器地址等并请妥善保管这些信息。

如何完成 Dynamics 365 授权？

配置一个 AAD 的主体是实现认证的最佳选项。AAD 是 Azure Active Directory 服务的简写，它提供了单点登录等众多认证功能。Dynamics 365（online）、Office365 等服务使用 AAD 作为其认证方式。

完成 Dynamics 365 授权,首先需要您创建一个 AAD 账号用以访问 Dynamics 365。创建步骤如下:

- 1.使用你的组织身份访问 <https://portal.azure.com/> , 使用 App registrations 功能, 点击 new registration, 输入要创建的 Application 的 Name, 账户类型选择 single tenant。该 Application 就是代表 CRM 的访问身份。
- 2.创建 Application 之后,在左侧菜单栏中,点击 overview 找到您的 ApplicationID 和 DictionaryID 并妥善保管。
- 3.点击左侧菜单栏 Certificates & secrets,新建一个 Client secret,即对此 Application 创建一个(或多个)密码。如果你的程序需要长期无人值守运行,请将过期时间设为 never。密码只显示一次,请妥善保管,如果丢失只能新建其他密码
- 4.点击左侧菜单栏 API permissions,加 Dynamics 365 的 API 访问授权,在此处,勾选 Dynamics Crm 中的 user_impersonation 权限,确定保存。至此,AAD 主体身份创建完成。你应该保存有 Client Id, Client secret,一个(或多个)密码信息。接下来,转到你的组织的 Dynamics 365 实例中,对该 Application 进行授权。
- 5.在 Dynamics 365 中,使用拥有用户管理权限身份的账号登录,转到 Settings--Security-Users,切换 view 为 Application users,选择 new 新建一个用户。在新建表单的 Application Id 处输入上一步得到的 Client Id,并设置一个组织以外的邮箱作为 Primary Email,并保存,该步骤的含义是为刚才 AAD 中创建的主体开通一个 Dynamics 365 账号。至此就完成了 AAD 用户的创建过程。
- 6.在 Dynamics 365 中,转到“设置(Settings)--安全(Security)--用户(Users)--管理角色(Manage roles)”设置该账号的角色。Wechat Marketing Operator 和 Wechat Marketing Administrator 是我们内置的角色,分别用于普通用户和管理者。它将以最小权限访问您的 Dynamics 365 中的必要数据。如果您有疑虑,可以自行查阅该角色的授权情况。
- 7.在 Dynamics 365 的上方导航栏中点击 Wechat marketing,选择左下角的“设置(Setting)”,点击“已注册的的服务(Signed Services)”,点击“新建(new)”,按界面提示输入上述信息。这意味着,您将该账号发送给了我们用于数据交互。至此,配置完成。

如何取消或更改微信授权?

- 1.登入公众号页面—自定义菜单
- 2.点击已授权第三方平台
- 3.点击授权管理—查看平台详情
- 4.点击取消授权

如何取消 Dynamics 365 授权？

在 Dynamics 365 上方导航栏中点击 Wechat marketing，选择左下角的“设置（Setting）”，点击“已注册的的服务（Signed Services）”，找到您需要取消授权的项目，打开编辑表单，取消“我已阅读并同意以下协议”的勾选，并保存该记录。

HELP

Our Service

We provide the integration service of Microsoft Dynamics 365 (“Dynamics 365”) and WeChat official account, so that users can manage their WeChat Official account in Dynamics 365.

What is Dynamics 365?

Dynamics 365 is Microsoft's comprehensive solution for users, including sales, marketing, service, operations and commerce, and has a wide range of users around the world.

What are WeChat and WeChat official account?

WeChat, the most widely used instant-messaging app in China, is launched by Tencent. WeChat official account is an application account that Tencent provided for developers and businesses. Through WeChat official account, businesses can comprehensively communicate and interact with specific group through text, pictures, voice, videos. WeChat official account marketing is a popular online interactive marketing.

Why do you need our service?

With our service, you can use the function of WeChat official account in Dynamics 365 to interact with users and customers and provide them services. This interaction makes up for the lack of Marketing components in the Mainland Version of Dynamics 365, as well as the data gap between Dynamics 365 and the backend of official account -- your chat records will be stored in the Dynamics 365 system.

Why do you choose our third- party service rather than Dynamics 365’s own WeChat official account developer?

IP address cannot access WeChat official account before it is added into white list. However, there is a set of IP addresses of Dynamics 365 (<https://support.microsoft.com/en-us/help/2728473/microsoft-dynamics-crm-online-ip-address-ranges>). In addition, there are some extra IP addresses when you authorize with Dynamics 365. The maximum of IP addresses in the whitelist is far less than the number of Dynamics 365 IP addresses. Our product can solve this problem. We will set up our server address. The service is out of the box for you.

How do we connect Dynamics 365 and WeChat?

Tencent provides a service called "WeChat official platform-third-party platform" (3rd-party platform). We are a third-party platform certified by Tencent and the only one to connect Dynamics 365. We can call WeChat API to operate your official account-of course, with your authorization. At the same time, we can also use your Dynamics 365 functions through the Dynamics 365 API -again, this also requires your authorization, and the account we use will also be restricted by your permission settings in Dynamics 365. All you need to do is to provide us with authorization for both, and leave the rest to us.

How to use our services?

As mentioned above, you need to provide WeChat official account management authorization and Dynamics 365 account authorization. You need to install the product we published on App Source in your Dynamics 365 environment. This is all you need to do-afterwards, you can perform simple operations on the interface provided by the Solution to manage the official account.

Whether our WeChat official account authorization is safe or not?

We use the management API provided by Tencent to implement the escrow function. All communications are strictly encrypted in the way designed by Tencent. Your authorization can also be accurate to the permission of each API. You can modify the permissions so that we can only access the functions you wish to open. And you can cancel your authorization at any time.

Whether our Dynamics 365 authorization is safe or not?

We will use the AAD-authenticated Application User to access your Dynamics 365 instance. The user can be given the appropriate role to complete the task with minimal permissions (in fact, we have a preset role), and you can review the role or modify the authorization at any time in your instance. For you, the access account looks like a normal user -- but it doesn't take up your license. Also, the communication between us is encrypted by Microsoft and is unbreakable.

How to authorize WeChat official account?

After installing our application, you can click on "WeChat marketing" in the upper navigation bar of Dynamics 365, click on "Start To Use" of the "Setting" in the lower-left corner and select an authorization button suitable for you. When the page jumps to the authorization page, enter your original ID, which can be obtained in the

management pages of the official account (<https://mp.weixin.qq.com/cgi-bin/home>) -- Settings -- original ID. After that, you will be redirected to the WeChat official authorization page. The only thing you need to do is click on “confirm authorization”. The page then jumps back to the authorization information display screen, showing your AppId, the token set up, the server address deployed, etc. Please keep these information properly.

How to authorize Dynamics 365 account?

Configuring an AAD subject is the best option for authentication. AAD, short for Azure Active Directory service, provides many authentication features, including single sign-on. Services such as Dynamics 365 (online) and Office365 use AAD as their authentication method.

To complete Dynamics 365 authorization, you first need to create an AAD account to access Dynamics 365. The steps are as follows:

1. Visit <https://portal.azure.com/> with your organization's identity, using the function of registrations. Click on “new registration”, enter the Application's Name, and then choose single tenant as the account type. This Application is the access identity on behalf of CRM.
2. After creating the Application, please click on “Overview” to find your ApplicationID and DictionaryID in the left menu bar, and keep them properly.
3. Click on “Certificates & secrets” in the left menu bar to create a new Client secret, that is, create a password (or more) for this Application. If your program needs to run unattended for a long time, please set the expiration time to never. The password is only displayed once, please keep it properly, if you lose it, you can only create another password
4. Click on “API permissions” in the left menu bar and add API access authorization for Dynamics 365. Here, check the user_impersonation permission in Dynamics Crm to confirm and save. At this point, the AAD principal identity is created. You should keep the Client Id, Client secret, and one (or more) password(s). Next, go to the Dynamics 365 instance of your organization and authorize the Application.
5. Log in Dynamics 365 with a management account, switch the view to Application users in Settings--Security-Users, and click on “new” to create a new user. Input the Client Id obtained in the previous Application Id of the new form, set up a mailbox outside the organization as the Primary Email, and save it. This step is to open a Dynamics 365 account for the subject created in AAD just now. An ADD user is created now.
6. In Dynamics 365, go to “Settings-Security-Users-Management Roles” to set the account role. “Wechat Marketing Operator” and “Wechat Marketing Administrator” are our built-in roles for normal users and administrators respectively. They will

access the necessary data in your Dynamics 365 with minimum permissions. If you have doubts, you can check the authorization of the role.

7. Click on “Wechat Marketing” in the upper navigation bar of Dynamics 365, then click on “Setting-Signed Service-new” in the lower-left corner and input the above information as prompted. This means that you sent the account to us for data interaction. At this point, the configuration is complete.

How to cancel or modify WeChat authorization?

1. Log in the official account page-custom menu.
2. Click on “authorized third-party platform”.
3. Click on “Authorization Management-View platform details”
4. Click on “Cancel Authorization”

How to cancel Dynamics 365 authorization?

Click on “Wechat Marketing” in the upper navigation bar of Dynamics 365, select “Setting” in the lower left corner, and click on “Signed Services”. After finding the item you need to cancel the authorization, open the edit form, cancel “I have read and agreed to following agreement” checkbox, and save the record.