



 Microsoft Dynamics 365
CE INTEGRATION

Harness Human Connection

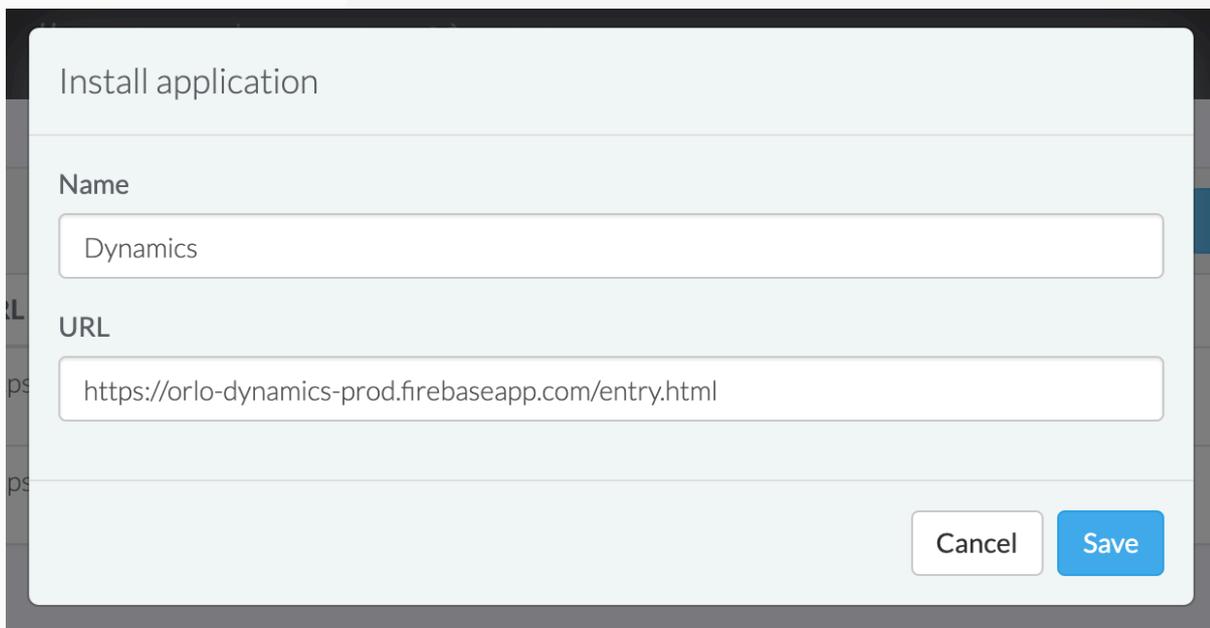
**Create powerful online experiences + emotional
connections with your customers**

Installing the Dynamics Plugin for Orlo

The following guide is for customers using our hosted solution.

INSTALLING THE APPLICATION

While inside Orlo and logged into an account with the administer company permission click on the top right user icon and navigate to Settings -> Manage apps -> Create new. You should be met with the following popup.



Install application

Name

Dynamics

URL

https://orlo-dynamics-prod.firebaseio.com/entry.html

Cancel Save

Name the application and enter <https://orlo-dynamics-prod.firebaseio.com/entry.html> in the URL box

CONFIGURING AZURE

You should now see the application listed in the Manage Apps screen. To enable Orlo to talk to your dynamics instance you must first set this up inside Azure.

If you haven't setup a Dynamics instance before then please follow the steps outlined in the Microsoft documentation here <https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/walkthrough-register-app-azure-active-directory>

Login to the Azure portal and navigate to Azure Active Directory -> App registrations -> select your app -> Authentication and add:

<https://orlo-dynamics-prod.firebaseio.com/entry.html> to the redirect URIs.

You will also need to apply the follow settings for the integration to work.

Under Implicit Grant make sure you select both options;

Implicit grant

Allows an application to request a token directly from the authorization endpoint. Recommended only if the application has a single page architecture (SPA), has no backend components, or invokes a Web API via JavaScript. [Learn more about the implicit grant flow](#)

To enable the implicit grant flow, select the tokens you would like to be issued by the authorization endpoint:

- Access tokens
- ID tokens

Ensure that you have selected the Multitenant option under Supported account types;

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (orlo.tech only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)

CONNECTING TO DYNAMICS

Now you must connect your dynamics instance. Click on settings next to your application and you will be prompted to connect. This requires three pieces of information

- Tenant: This is usually found in the Azure portal inside the active directory under the config settings for your dynamics instance e.g [YOUR_COMPANY.onmicrosoft.com](#)
- Client Id: This will be found in the same place as the Tenant
- Crm Url: This enables the integration to make the correct API calls to your instance. This is simply the URL you use to login to your dynamics via a web browser

Upon completing this information you should be able to proceed with using the integration.

CONFIGURING THE PLUGIN

Once you have successfully connected your instance through the Orlo Dynamics plugin you will be able to configure it to your needs. There are a few options of note.

Please select what type of profile you would like to link your Dynamics to

- Contacts
- Accounts