Cloud Based Microsoft Dynamics Integration

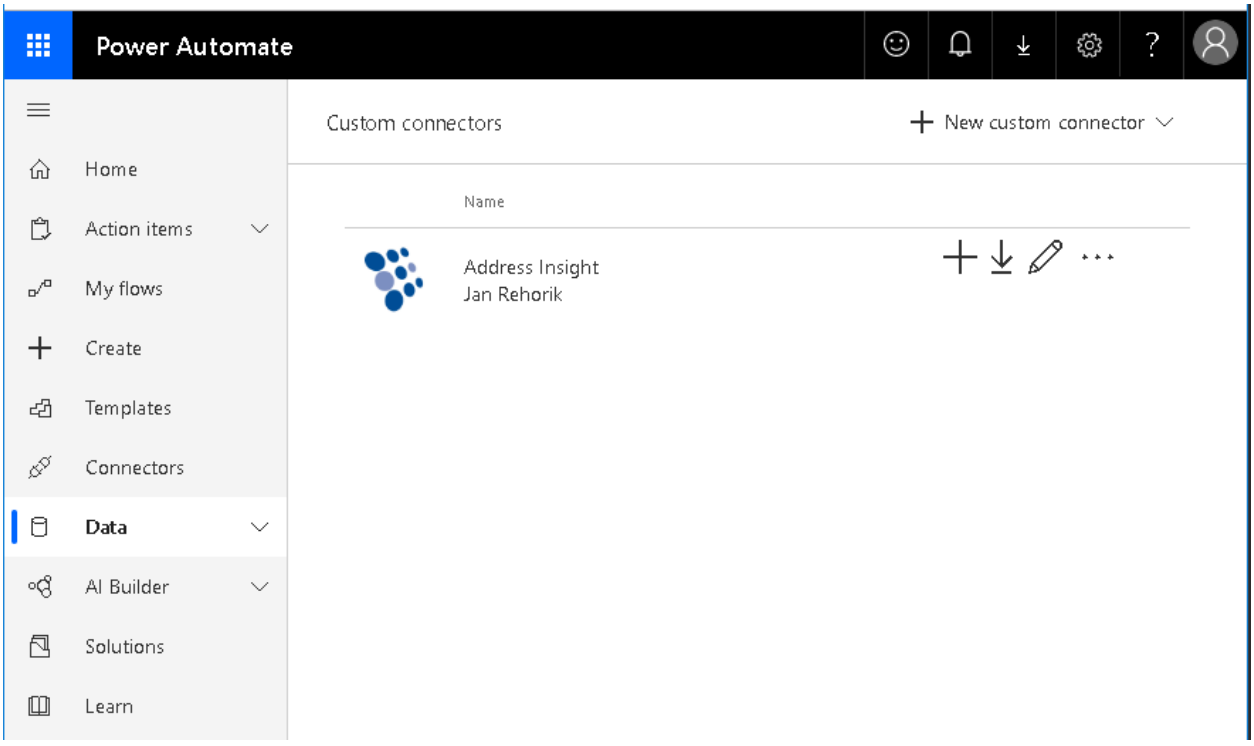
For cloud based Microsoft Dynamics instances a custom connector can be created using Power Automate. The tools available allow you to easily integrate the Service Objects web services into your CRM. By leveraging the custom connector you benefit from the following:

- A complete solution can be written with limited programming knowledge and used throughout your system
- HTTPS requests can be made over the GET protocol for secure data transmission
- The CRM's tooling will automatically generate the response fields. These response fields can be leveraged in your workflow

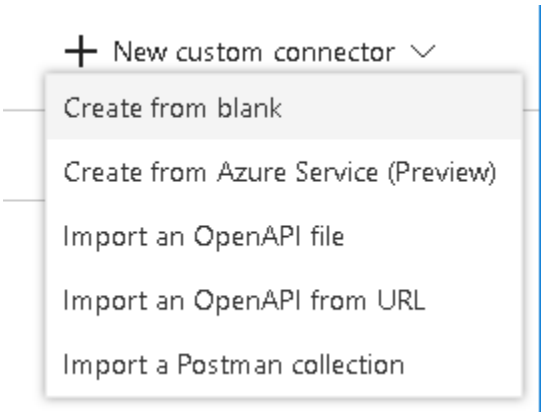
Below are the steps you should take to create a custom connector. The sample integration uses the DOTS Address Insight web service but the process is similar across our different product offerings.

Creating A Custom Connector

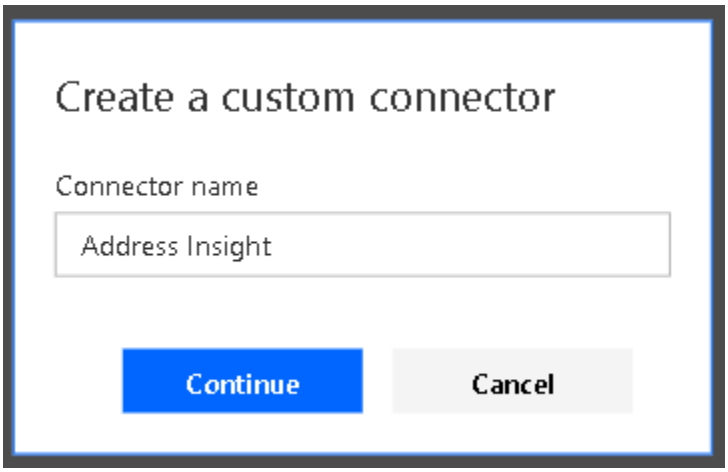
1) Log into your Microsoft Dynamics account and navigate to the Power Automate Section
2) Select the Data drop down menu and click on Custom connectors



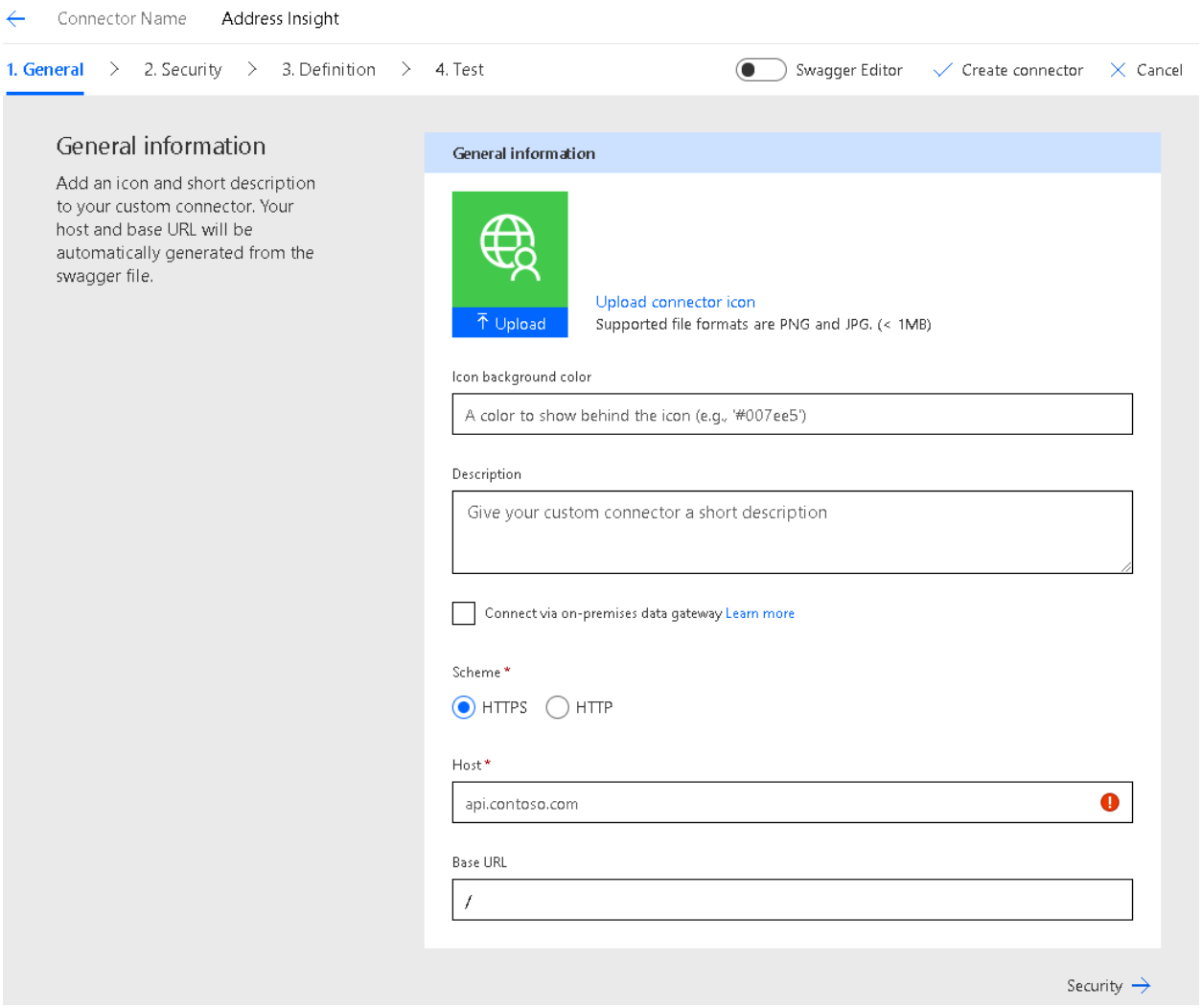
3) Create from blank

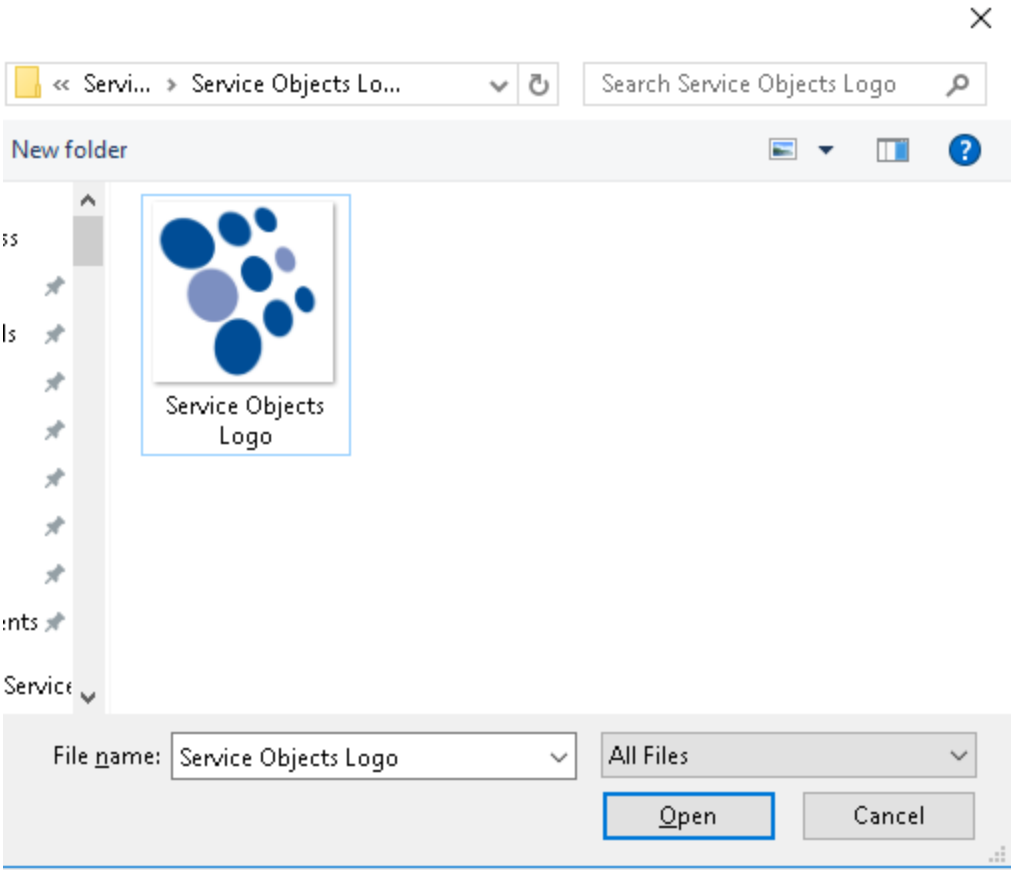


4) Give your custom connector a name



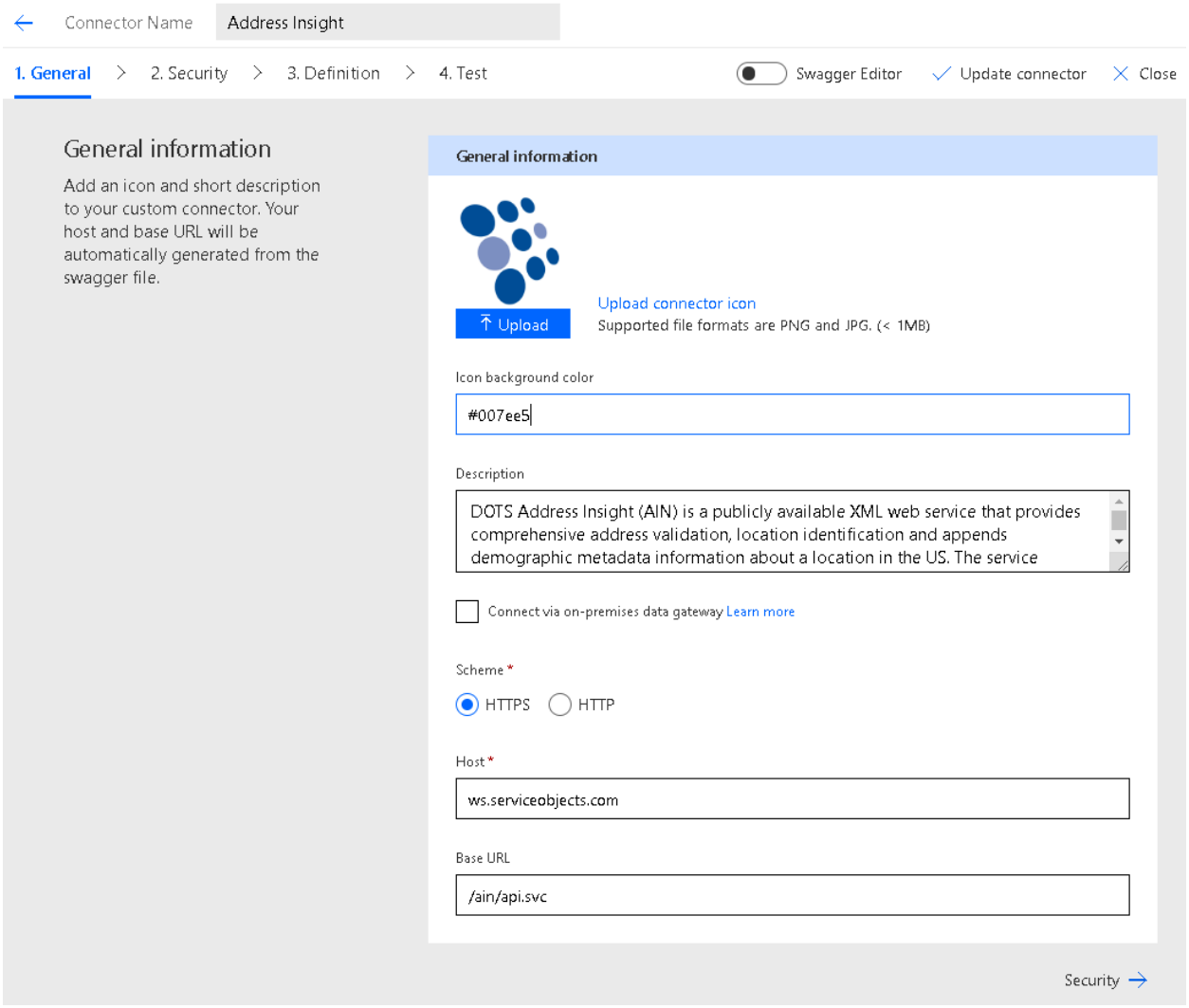
5) In the General Information panel select “Upload connector icon” and choose an image for your connector


Connector Name
Address Insight
1. General
2. Security
3. Definition
4. Test
Swagger Editor
Create connector
Cancel
General information
Add an icon and short description to your custom connector. Your host and base URL will be automatically generated from the swagger file.
General information
Upload
Upload connector icon
Supported file formats are PNG and JPG. (< 1MB)
Icon background color
A color to show behind the icon (e.g., '#007ee5')
Description
Give your custom connector a short description
Connect via on-premises data gateway Learn more
Scheme *
HTTPS
HTTP
Host *
api.contoso.com
Base URL
/
Security



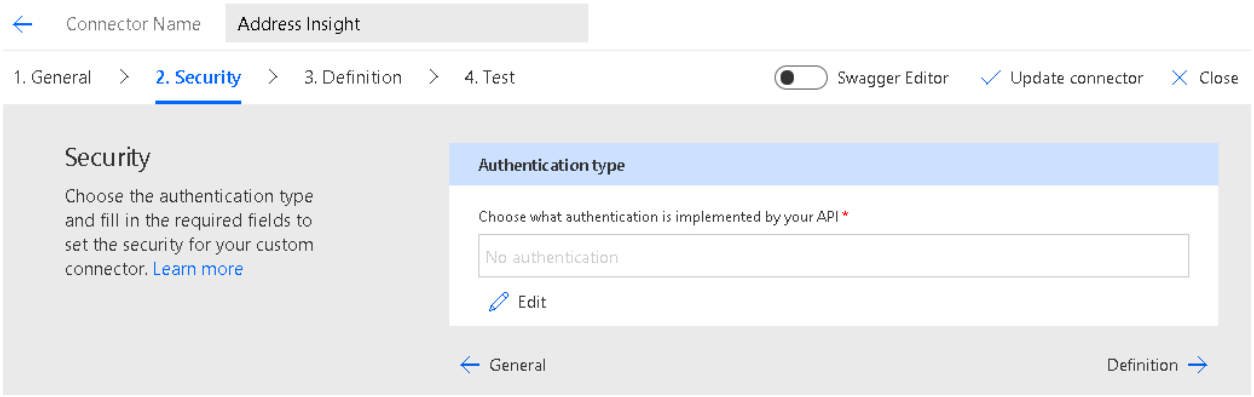
6) A description isn't necessary but it can help explain the purpose of the connector

7) Select the HTTPS radio button under the Scheme header

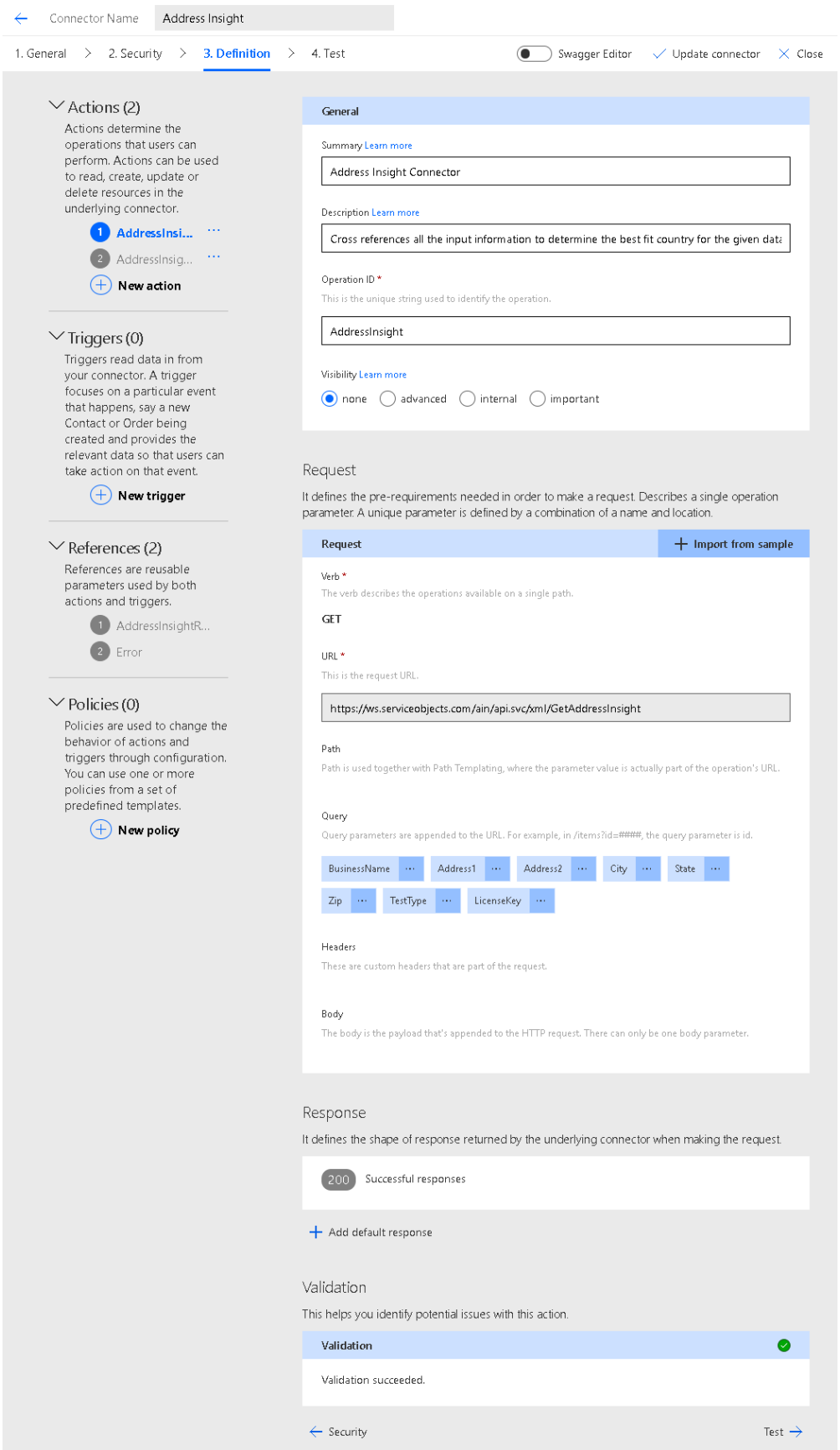


8) The host will vary depending on your environment and desired web service.
    a. For production transactions use ws.serviceobjects.com
    b. For trial transactions use ws.serviceobjects.com
9) The base URL will vary depending on the desired web service (Service Objects can provide you with the proper URL to use upon request)

10) In the Security panel there are no settings to change



11) In the Definition panel provide a unique Operation ID


Connector Name
Address Insight
1. General
2. Security
3. Definition
4. Test
Swagger Editor
Update connector
Close
Actions (2)
Actions determine the operations that users can perform. Actions can be used to read, create, update or delete resources in the underlying connector.
1 AddressInsi...
2 AddressInsig...
New action
Triggers (0)
Triggers read data in from your connector. A trigger focuses on a particular event that happens, say a new Contact or Order being created and provides the relevant data so that users can take action on that event.
New trigger
References (2)
References are reusable parameters used by both actions and triggers.
1 AddressInsightR...
2 Error
Policies (0)
Policies are used to change the behavior of actions and triggers through configuration. You can use one or more policies from a set of predefined templates.
New policy
General
Summary Learn more
Address Insight Connector
Description Learn more
Cross references all the input information to determine the best fit country for the given data
Operation ID *
This is the unique string used to identify the operation.
AddressInsight
Visibility Learn more
none
advanced
internal
important
Request
It defines the pre-requirements needed in order to make a request. Describes a single operation parameter. A unique parameter is defined by a combination of a name and location.
Request
Import from sample
Verb *
The verb describes the operations available on a single path.
GET
URL *
This is the request URL.
https://ws.serviceobjects.com/ain/api.svc/xml/GetAddressInsight
Path
Path is used together with Path Templating, where the parameter value is actually part of the operation's URL.
Query
Query parameters are appended to the URL. For example, in /items?id=#####, the query parameter is id.
BusinessName
Address1
Address2
City
State
Zip
TestType
LicenseKey
Headers
These are custom headers that are part of the request.
Body
The body is the payload that's appended to the HTTP request. There can only be one body parameter.
Response
It defines the shape of response returned by the underlying connector when making the request.
200
Successful responses
Add default response
Validation
This helps you identify potential issues with this action.
Validation
Validation succeeded.
Security
Test

12) Under the Request – Verb header choose GET
13) The URL for the request will depend on the web service and desired operation (Service Objects can provide you with the proper URL to use upon request)
14) The Example Workflow demonstrates a potential integration you could work into your system. In the example the flow will trigger when a new record is created. The fields will be automatically pulled from the new record and run through the Service Objects web service. From there conditional logic can be added to handle the response object and apply your particular business logic to the workflow.