

[Sign In](#)

[Free Trial](#)

[Documentation](#) > [Connect to Microsoft Dynamics 365](#)

Connections

[Connect to Eloqua](#)
[Connect to HubSpot](#)
[Connect to Iterable](#)
[Connect to Marketo](#)
[Connect to Microsoft Dynamics 365](#)
[Connect to ON24](#)
[Connect to Pardot](#)
[Connect to Salesforce](#)
[Connect to SalesLoft](#)

FAQ

[Captcha Support](#)
[Email Blacklist](#)

Guides

[Agency Workspace](#)
[Getting Started With Automaton](#)
[Glossary of Features & Terms](#)
[Making a Payment](#)
[Notifications & Alerts](#)
[Operating in Public](#)
[Realtime Monitoring](#)
[Web Analytics Data Filtering](#)

Starters

[Confirmation Email Check](#)
[Google Analytics](#)
[Lead Data Mapping](#)
[Marketo Munchkin Check](#)
[Marketo: Form to Lead](#)
[Marketo: Validate SPF](#)
[Salesforce: Validate SPF](#)
[SEO: Basic Social Meta Tags](#)

Support

[Contact Us](#)

Connect to Microsoft Dynamics 365

Last updated 03-30-2021

Stack Moxie uses an **Application User** to run checks against your Microsoft Dynamics 365 instance. In order to make the connection, you will need the following pieces of information:

- Your **Dynamics 365 Instance URL**
- The **Application (Client) ID** of an associated Azure App Registration
- And a valid **Client Secret** for the Azure App Registration

At a high level, this article will walk through:

- **Finding your Instance URL** →
- **Creating an App Registration** → in Azure with the right permissions,
- **Creating an API User role** → in Dynamics 365, if necessary,
- **Creating an Application User** → in Dynamics 365 with the right permissions, tied to the Azure App Registration.

Note: Stack Moxie securely encrypts all of your connections' credentials.

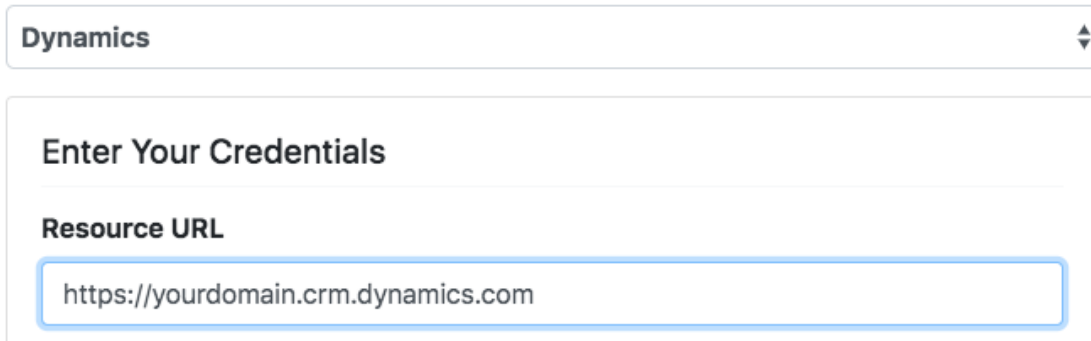
Find your Instance URL

In order to communicate with your Dynamics 365 instance, Stack Moxie needs to know where it is! Finding your instance URL is simple.

Log in to Dynamics 365 and navigate to your **Sales Hub** homepage. Copy the contents of your address bar until the first slash, e.g. <https://>

`yourdomain.crm.dynamics.com`

Paste this into the **Resource URL** field on the Stack Moxie Connection modal. Note: you must include the `https://` from the URL.



The screenshot shows a modal window titled "Dynamics" with a dropdown arrow on the right. Below the title is a section titled "Enter Your Credentials". Underneath this section is a label "Resource URL" followed by a text input field containing the URL `https://yourdomain.crm.dynamics.com`. The input field has a blue border.

Create an Azure App Registration

Instead of using a username and password, Stack Moxie communicates with Microsoft Dynamics 365 using application client credentials tied to an Azure App Registration.

To create an App Registration, log in to your Azure Portal and navigate to the **App Registrations** page by searching for **App Registrations** in the search bar.

Microsoft Azure Search resources, services, and docs (G+)

Home > App registrations

App registrations

+ New registration Endpoints Troubleshooting Got feedback?

All applications Owned applications

Start typing a name or Application ID to filter these results

Display name	Appli...	Created On	Certificates & secrets
AR	A Really Cool Applicati...	65699a... 6/20/2019	✓ Current
AC	Another Cool App Reg...	2fbc2e... 6/21/2019	✓ Current
AD	Alpha Delta CI/CD App	8e08ad... 8/5/2019	✓ Current

1. Click the **New Registration** button.
2. Enter a clear name like **Stack Moxie App User** into the **Name** field,
3. Select **Accounts in this organization directory only** option under **Supported account types** (this should be the default option)
4. Ignore the optional **Redirect URI** field.
5. Click the **Register** button.

Microsoft Azure Search resources, services, and docs (G+) atommy@yourdomain.c... YOURDOMAIN.COM

Home > App registrations > Register an application

Register an application

*** Name**
The user-facing display name for this application (this can be changed later).

Automaton App User ✓

Supported account types
Who can use this application or access this API?

Accounts in this organizational directory only (yourdomain.com only - Single tenant)
 Accounts in any organizational directory (Any Azure AD directory - Multitenant)
 Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

You will be directed to the overview page for your newly created App Registration.

Copy the **Application (client) ID** value (it should be a random string of letters and numbers) and paste it into the **Client Id** field in the Stack Moxie connection modal.

Dynamics

Enter Your Credentials

Resource URL

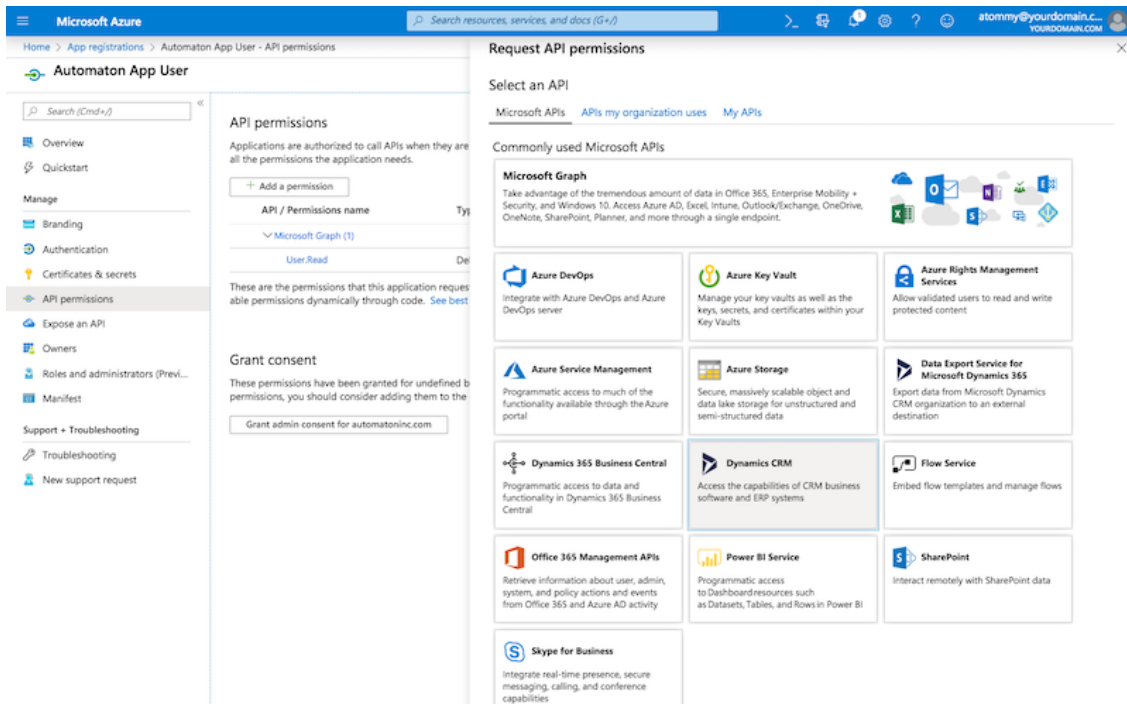
https://yourdomain.crm.dynamics.com

Client Id

c12ba345-0f1a-23ab-cd45-6789efab0123

1. From the App Registration overview page in Azure, click the **API Permissions** tab in the left-hand menu.
2. Click the **Add a Permission** button and select the **Dynamics 365** tile in the overlay.

3. On the next page of the overlay, check the **user_impersonation** permission and click **Add permissions** at the bottom of the pane.



1. Finally, click the **Certificates and Secrets** tab in the left-hand menu.
2. Click the **New Client Secret** button
3. Enter a clear name like Stack Moxie **App User Client Secret** as the **Description** in the resulting modal.
4. Set the **Expiration** to **Never** and click the **Add** button.
5. You will see your newly created **Client Secret**. Copy the value to your clipboard (this will never be shown to you by Azure again).

Back in the Stack Moxie connection modal, paste the Client Secret you copied about into the **Client Secret** field.

Dynamics

Enter Your Credentials

Resource URL

Client Id

Client Secret

Save **Help**

Phew! You're done creating an Azure App Registration, but you're not 100% done yet. Next, you need to configure Dynamics 365 to use this App Registration. Read on below.

Create an API User Role

The role we create in this section will be applied to the Application User we create in the next section, granting it permissions that Stack Moxie needs to

communicate with your Dynamics 365 instance.

If you already have a user role set up in Dynamics 365 for API users and other systems integrations, you can skip this section. Otherwise, keep reading.

1. Back in the Dynamics 365 UI, navigate to the **Settings** page by clicking the **gear icon** next to your user avatar, and clicking the **Advanced Settings** icon in the dropdown.
2. From the **Settings** page, click the downward arrow next to the **Settings** menu item in the main menu, then click **Security** under the **System** section of the resulting sub-menu.
3. Find and navigate to the **Security Roles** page.
4. Find the **System Administrator** role and select / check it
5. Toward the top of the page, click **More Actions** -> **Copy Role**

Dynamics 365 Settings Security

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

Security Roles

Business Unit: automatoninc

New [Icons] More Actions

Name	
Relationship Insights	
Resource Manager	
Sales Manager	automatoninc
Sales, Enterprise app access	automatoninc
Salesperson	automatoninc
Schedule Manager	automatoninc
Scheduler	automatoninc
Solution Checker	automatoninc
Survey Owner	automatoninc
Survey Services Administrator	automatoninc
<input checked="" type="checkbox"/> System Administrator	automatoninc
System Customizer	automatoninc
Vice President of Marketing	automatoninc
Vice President of Sales	automatoninc

1 - 47 of 47 (1 selected) All # A B C D E F G H I J K

Set the **new role name** to **API User** and click **OK**.

Create an Application User

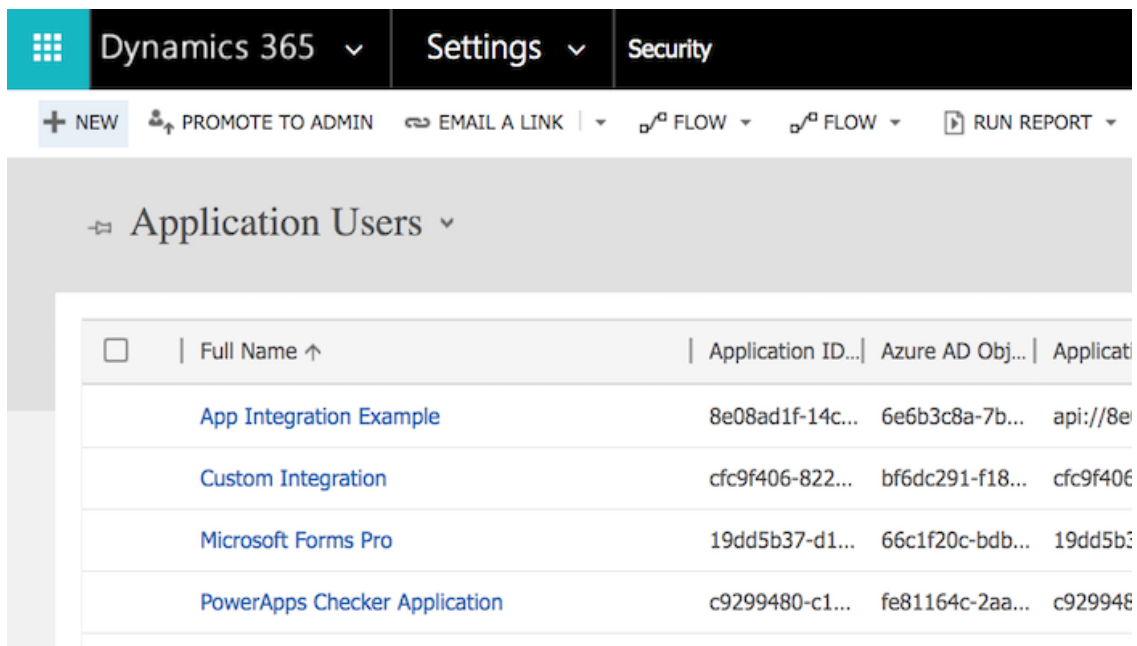
In this section, you'll create an Application User in your Dynamics 365 Instance that Stack Moxie will use to make API calls.

This Application User will get the security role you created above (or had created in the past), and be associated with the Azure App Registration you created at the beginning of this tutorial.

1. In the Dynamics 365 UI, navigate to the **Settings** page by clicking the

gear icon next to your user avatar, and clicking the **Advanced Settings** icon in the dropdown.

2. From the **Settings** page, click the downward arrow next to the **Settings** menu item in the main menu, then click **Security** under the **System** section of the resulting sub-menu.
3. Find and navigate to the **Users** page.
4. Change the view from the default to **Application Users** and click **New**




The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Security'. Below this is a toolbar with buttons for '+ NEW', 'PROMOTE TO ADMIN', 'EMAIL A LINK', 'FLOW', and 'RUN REPORT'. The main content area is titled 'Application Users' and contains a table with the following data:

<input type="checkbox"/>	Full Name ↑	Application ID...	Azure AD Obj...	Applicati
	App Integration Example	8e08ad1f-14c...	6e6b3c8a-7b...	api://8e
	Custom Integration	cfc9f406-822...	bf6dc291-f18...	cfc9f406
	Microsoft Forms Pro	19dd5b37-d1...	66c1f20c-bdb...	19dd5b37
	PowerApps Checker Application	c9299480-c1...	fe81164c-2aa...	c9299480

1. On the Application User creation page, enter a clear **Full Name** and **Primary Email Address** toward the bottom (e.g. stackmoxie-app-user@yourdomain.com). This will auto-populate the **User Name** field above.
2. In the **Application ID** field, enter the **Application (Client) ID** that you copied and entered above. This will auto-populate the **Application ID URI** and **Azure AD Object ID** fields.
3. Click **Save** toward the top of the page.

☰ Dynamics 365 ▼
Settings ▼
Security New User

SAVE
SAVE & CLOSE
FLOW ▼
FLOW ▼
FORM EDITOR


USER : APPLICATION USER ▼
New User ☰

! The information provided in this form is viewable by the entire organization.

Summary

Account Information

User Name * automaton-app-user@yourdomain.com

Application ID * 12345678-abcd-9012-efab-3456cdef7890

Application ID URI 🔒

Azure AD Object ID * 🔒

User Information

Full Name * Automaton App User

Primary Email * automaton-app-user@yourdomain.com

Finally, apply the **API User** role you created earlier by...

1. Navigating to the new Application User's overview page
2. Clicking the **Mange Roles** button toward the top of the page
3. And applying the **API User** role to the user.

[Contact us](#) [Help](#) [Terms of use](#) [Privacy policy](#)
Copyright © 2021 Automaton Marketing, Inc. All rights reserved.