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

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.

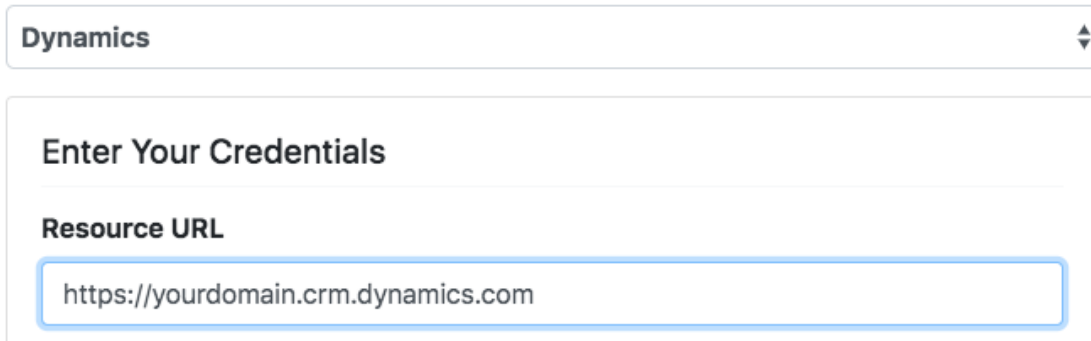*Note: Stack Moxie securely encrypts all of your connections' credentials.*

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.

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.

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.

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.

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.
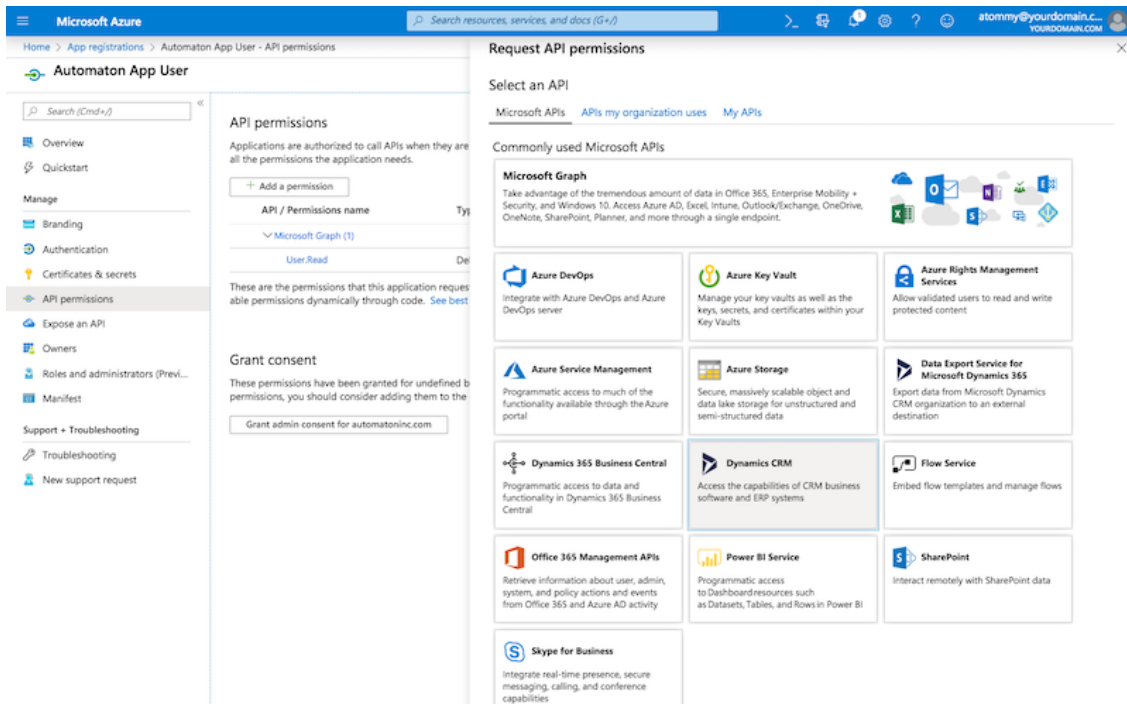
1. Finally, click the **Certificates and Secrets** tab in the left-hand menu.

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.

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**

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

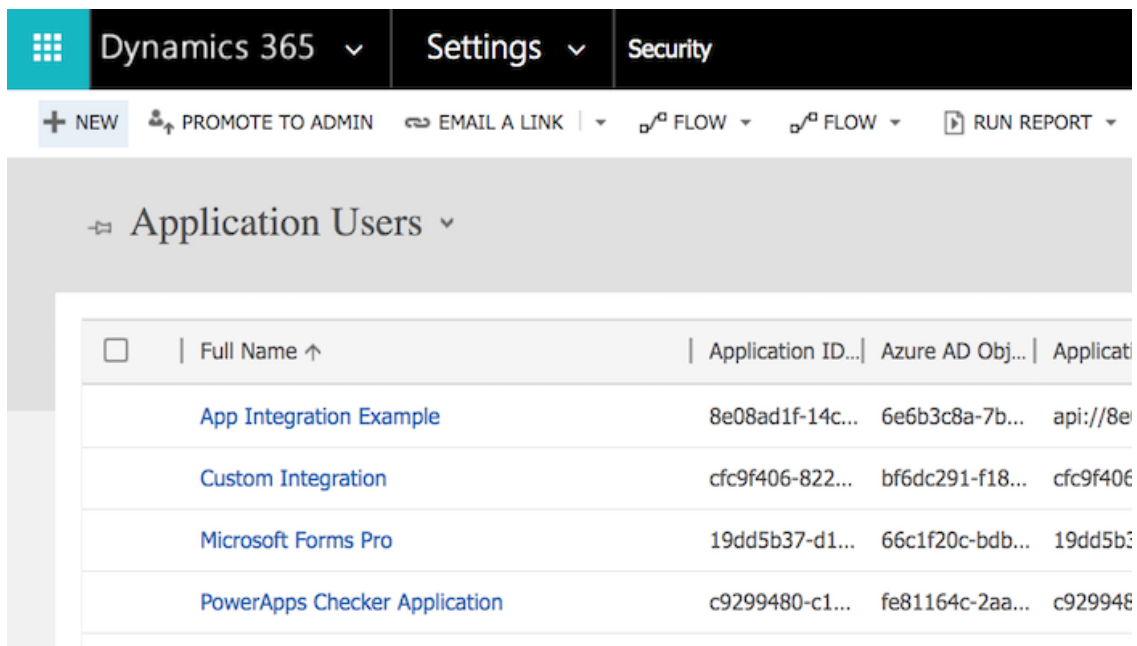# Create an Application User

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**

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.

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.

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