Configure App Registration for Dynamics 365

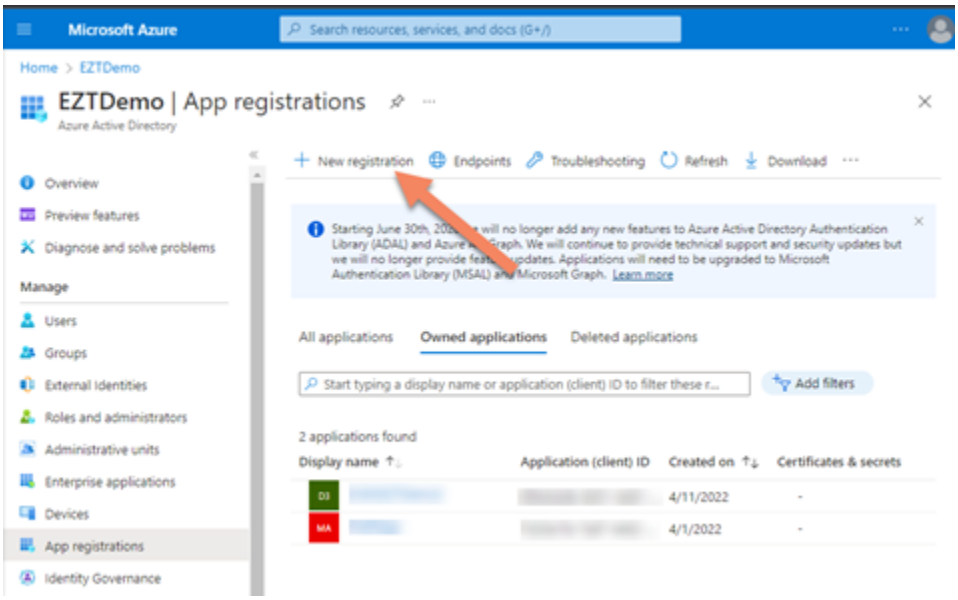
Dynamics 365 Configuration · https://www.easyterritory.com/documentation/territory-designer/administration/dynamics-365-configuration/configure-app-registration-for-dynamics-365/

The following are instructions for setting up EasyTerritory using the EasyTerritory forms-based authentication with Dynamics 365. Under this configuration, the EasyTerritory is prompted for EasyTerritory creds to log into the application, then prompted for Dynamics 365 credentials when adding a view from Dynamics.

NOTE: An alternative approach to this authentication model is to setup EasyTerritory with Azure Active Directory. Instructions for those configuration steps can be found here. Otherwise, follow these steps:

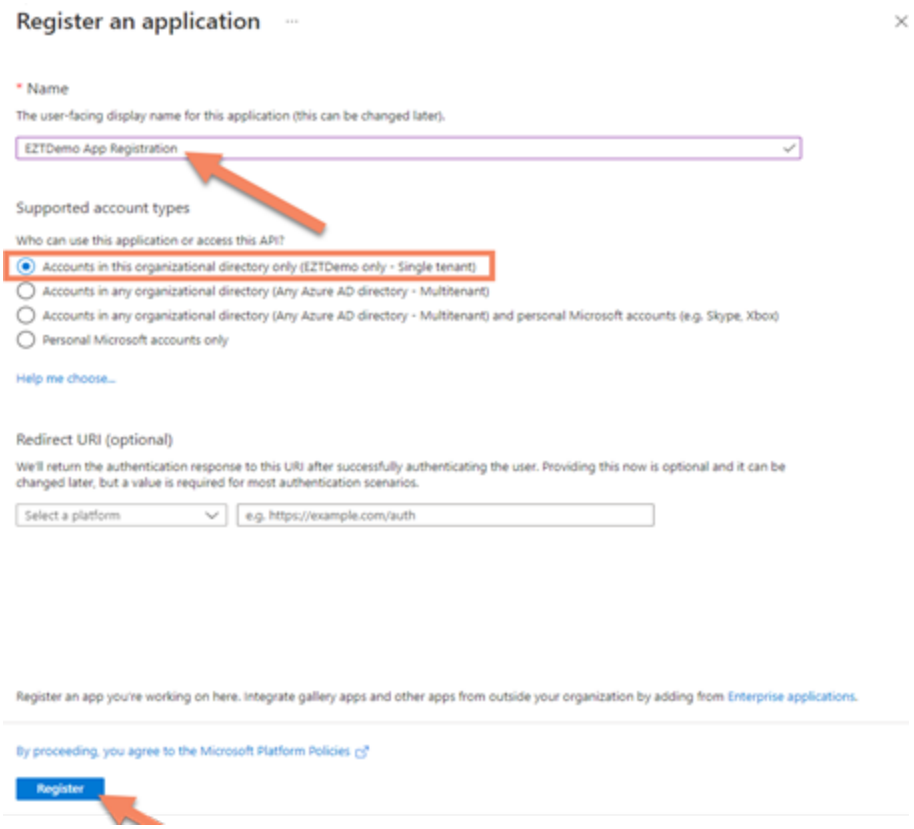
Step 1: Create an App Registration in the Azure portal > Azure Active Directory.

Under App registrations, select ‘New registration’



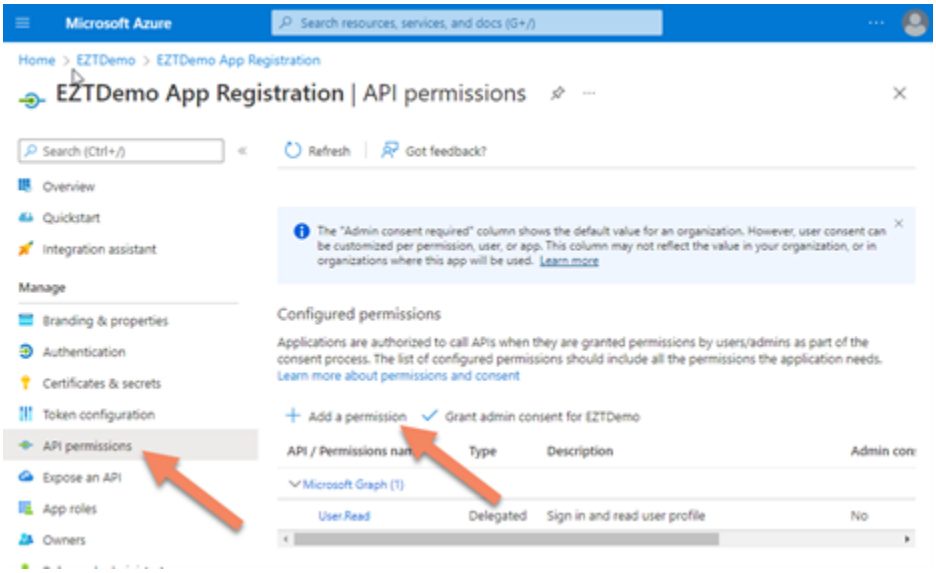
Create a friendly name to quickly identify the registration.

Select the scope of access for your organization.

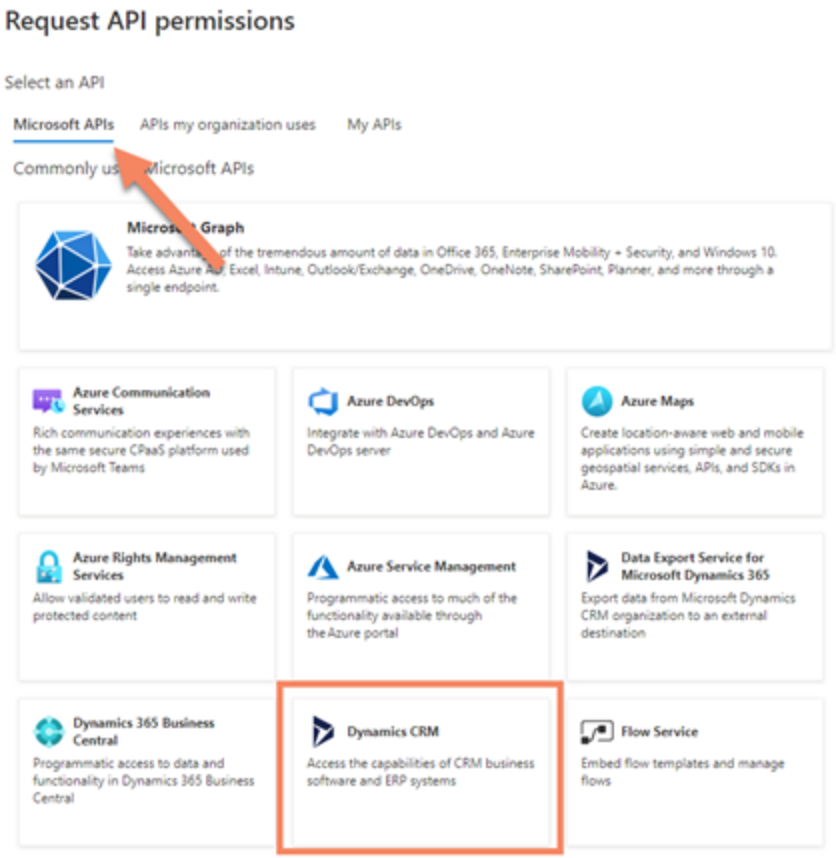


Step 2: Add API permissions

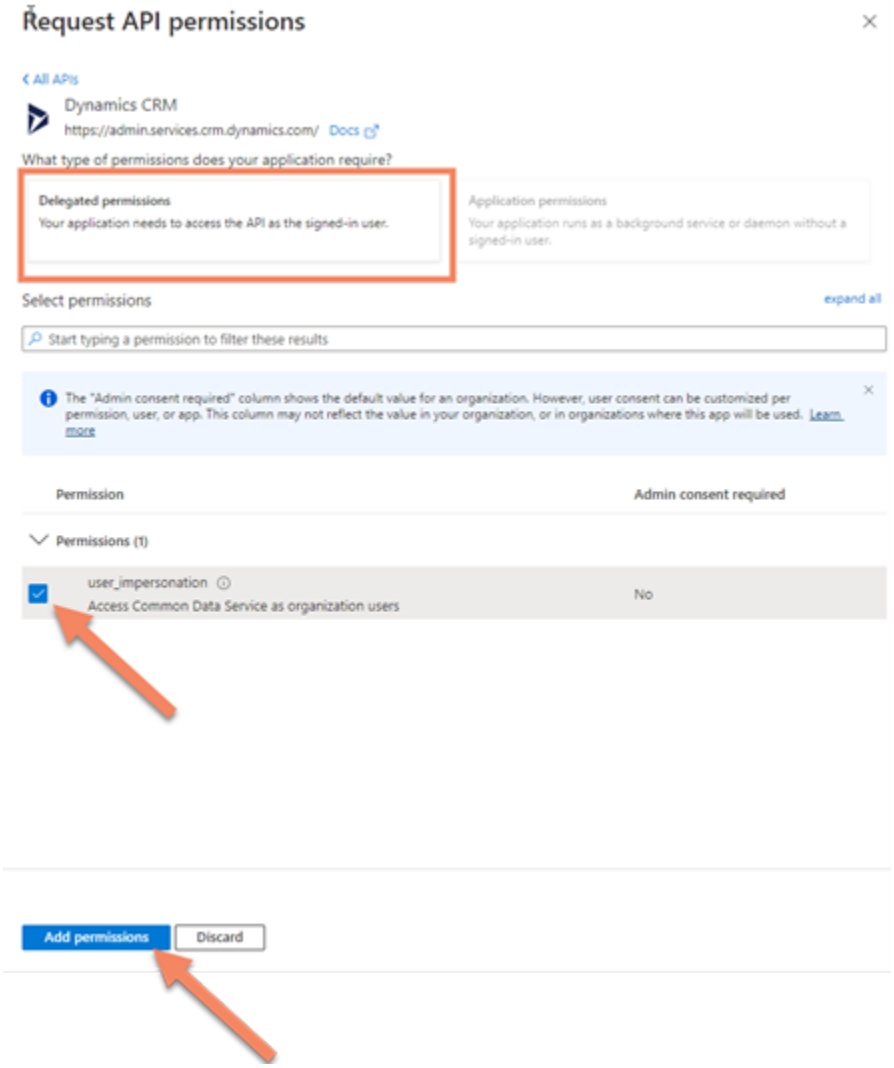
Select ‘API permissions’ and ‘Add a permission’



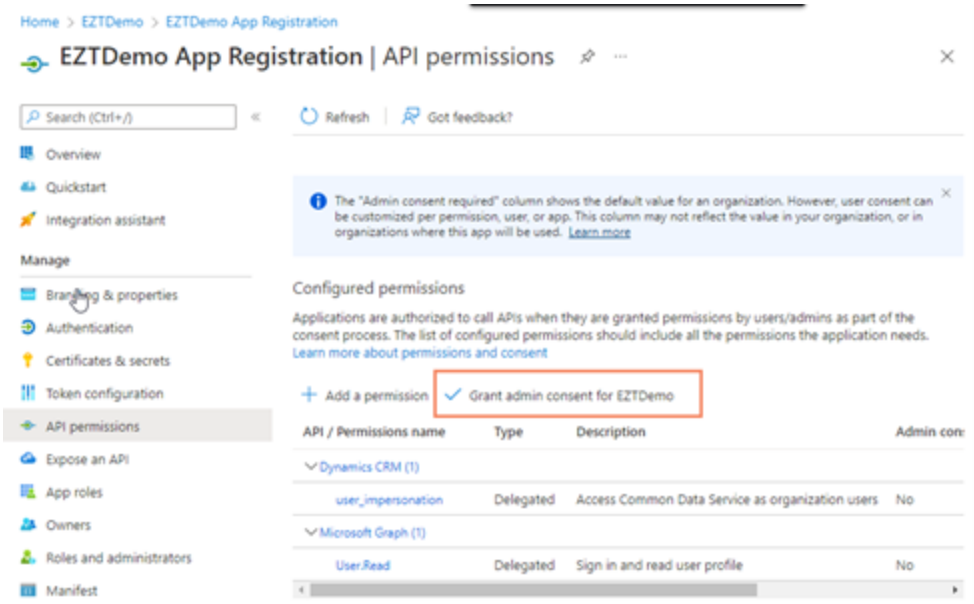
Add the Dynamics CRM API


Request API permissions
Select an API
Microsoft APIs
APIs my organization uses
My APIs
Commonly us Microsoft APIs
Graph
Take advanta of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.
Azure Communication Services
Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams
Azure DevOps
Integrate with Azure DevOps and Azure DevOps server
Azure Maps
Create location-aware web and mobile applications using simple and secure geospatial services, APIs, and SDKs in Azure.
Azure Rights Management Services
Allow validated users to read and write protected content
Azure Service Management
Programmatic access to much of the functionality available through the Azure portal
Data Export Service for Microsoft Dynamics 365
Export data from Microsoft Dynamics CRM organization to an external destination
Dynamics 365 Business Central
Programmatic access to data and functionality in Dynamics 365 Business Central
Dynamics CRM
Access the capabilities of CRM business software and ERP systems
Flow Service
Embed flow templates and manage flows

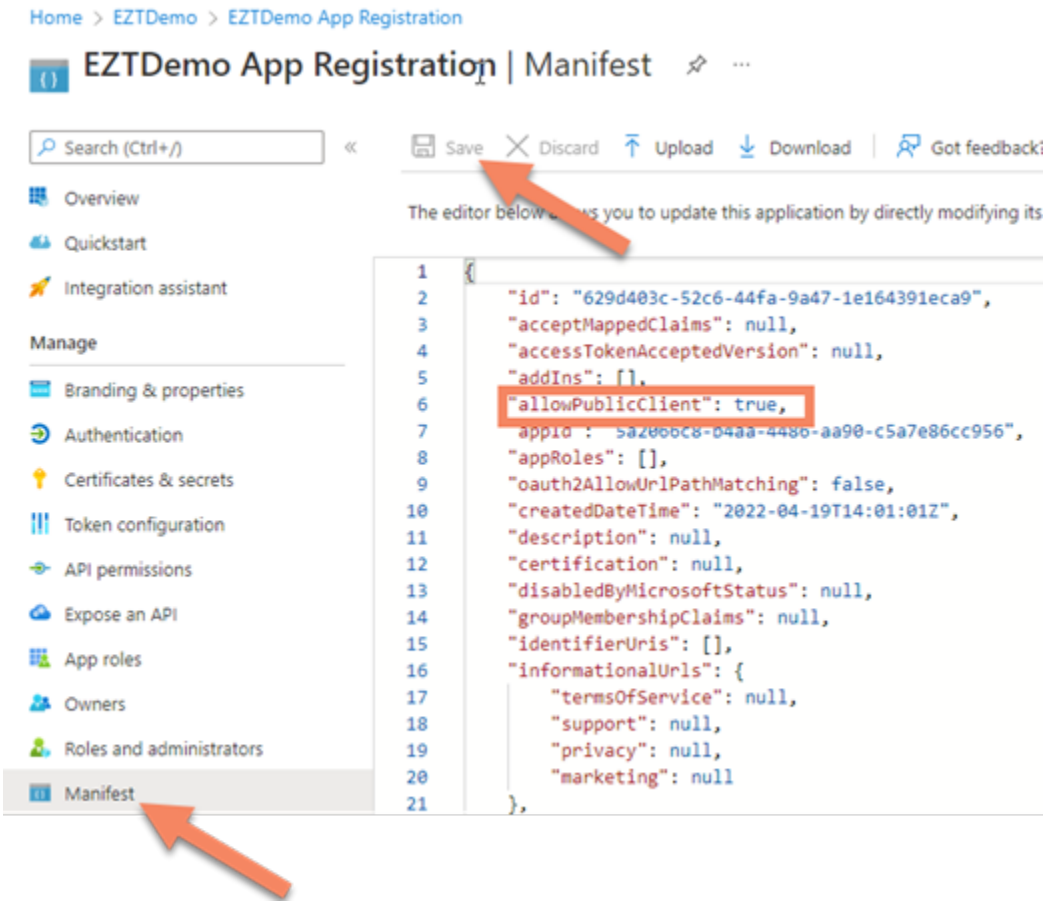
Step 3: Click ‘Delegated permissions and check the options and click on ‘user_impersonation’



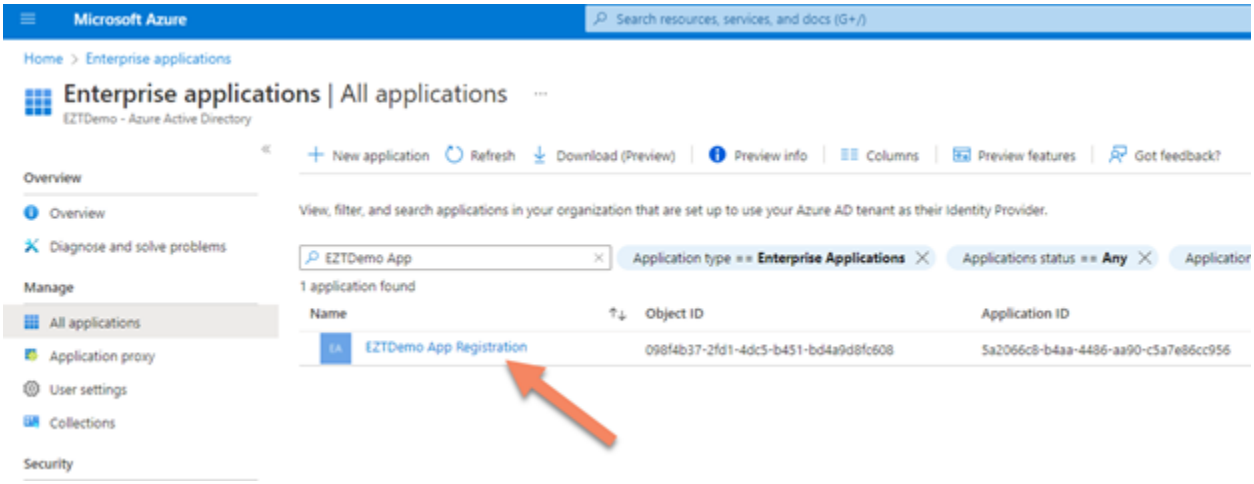
Select ‘Grant admin consent for…’



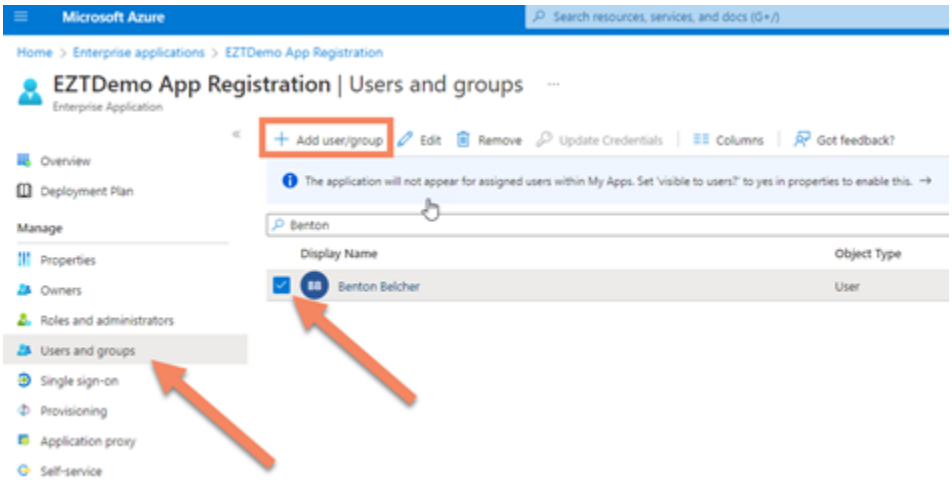
Step 4: Select the ‘Manifest’ tab and set the ‘allowPublicClient’ property to true and click ‘Save’.



Step 5: Browse to Azure Portal > Enterprise Applications > All applications

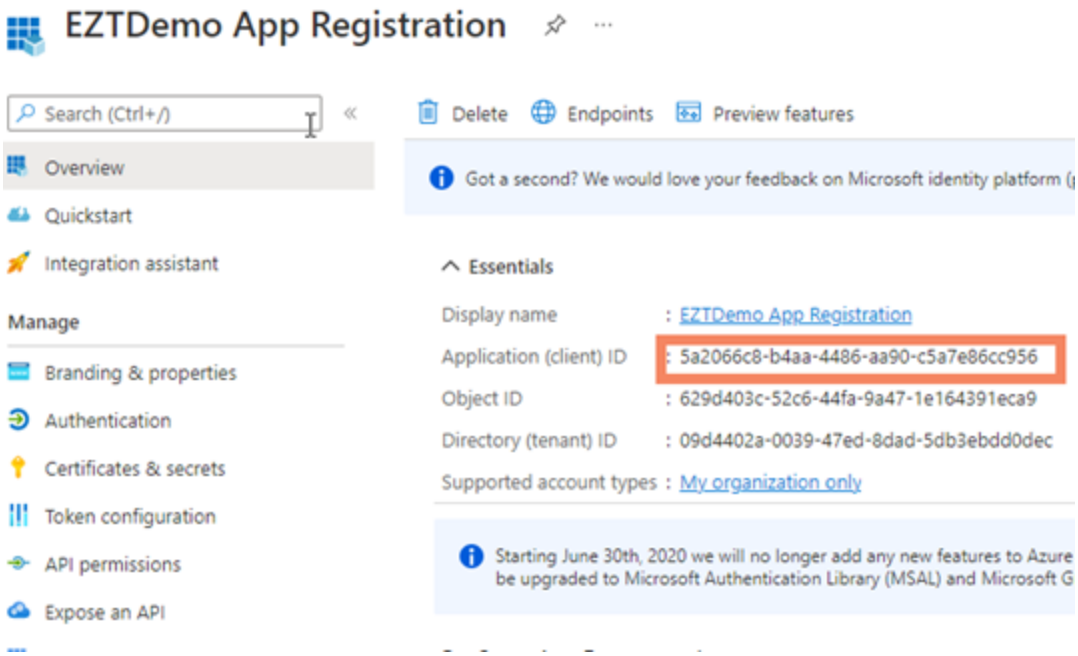


Select ‘Users and groups’ and ‘Add user/group’, to add a specific user or group of users. Lastly, select the checkbox next to desired user or group.



Step 6: Configure OAuth Configuration in you EasyTerritory App.

Browse to your newly created App Registration and copy the Application (client) ID



Browse to your EasyTerritory site and go to admin > settings.

Change the ‘Dynamics CRM authorization type’ from ‘Office 365’ to ‘OAuth’.

Enter the Application (client) ID from your App registration.



Step 7: Confirm everything is working correctly by opening up a Advanced Find project and enter your Azure AD credentials.