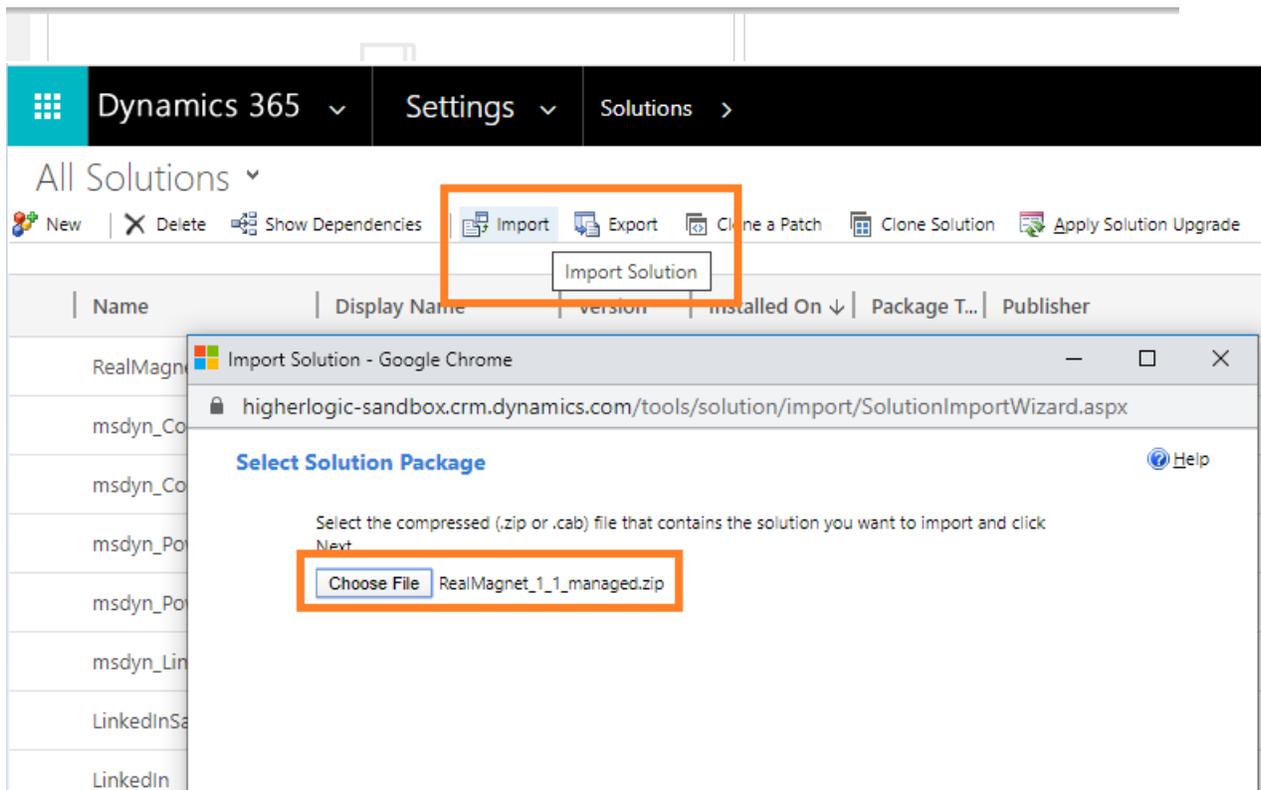
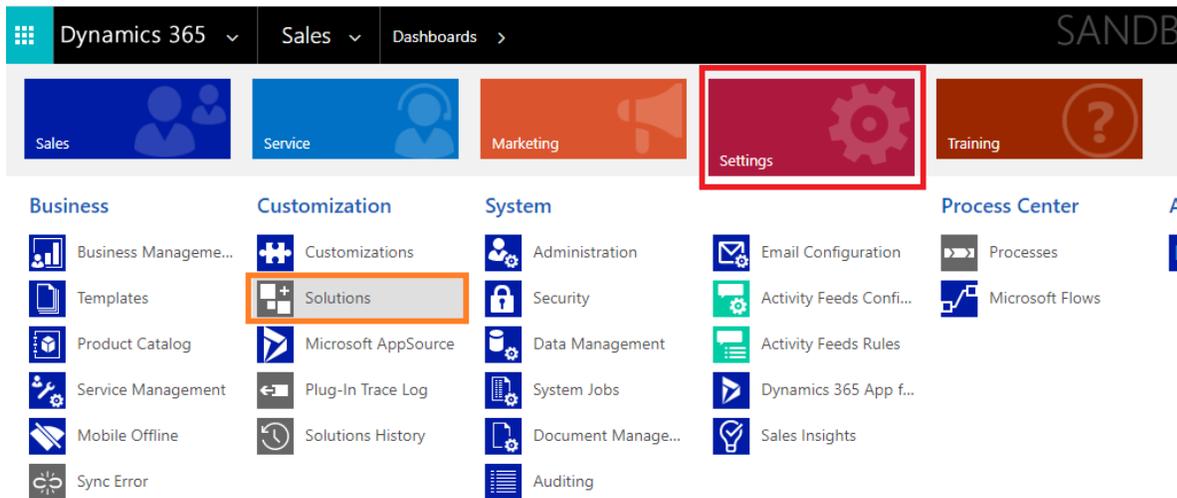


# Higher Logic Microsoft Dynamics Integration

The integration provides the ability to synchronize Accounts, leads, and Contacts from Dynamics 365. Additionally, the baseline fields of information from those objects.

## Install the Solutions Package

- 1) The Real\_Magnet\_1\_1\_managed.zip solution zip file should be installed in MS Dynamics. To do this, select Dashboards > Settings > Customizations > Solutions.
- 2) Then select the Import button in the Solutions toolbar. Complete the Import Wizard accordingly. After import, the solution should be published. Tracking activities will be displayed in the regular Activities panels.



## Tracking and Activity Component

- 3) Dynamics 365 Tracking plugin rely on existence of custom activity type with predefined name and field names. If you don't need tracking - you may skip these steps.
  - a. Login to Dynamic 365
  - b. Choose "Settings"->"Customization" menu
  - c. Click "Customize the System"
  - d. Click "Entities" on the left window
  - e. Choose "New"->"Entity"
  - f. There are two important fields on a form

New Working on solution: Default Soluti

Information

Common

- Information
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Business Rules

General Primary Field

Entity Definition

Display Name \* RM events

Plural Name \* RM Events

Name \* new\_rmevent

Primary Image

Color

Description

Ownership \* User or Team

Define as an activity entity

Display in Activity Menu

Areas that display this entity

Sales  Service  Marketing  Insights

Settings  Training

Options for Entity

Enable for interactive experience

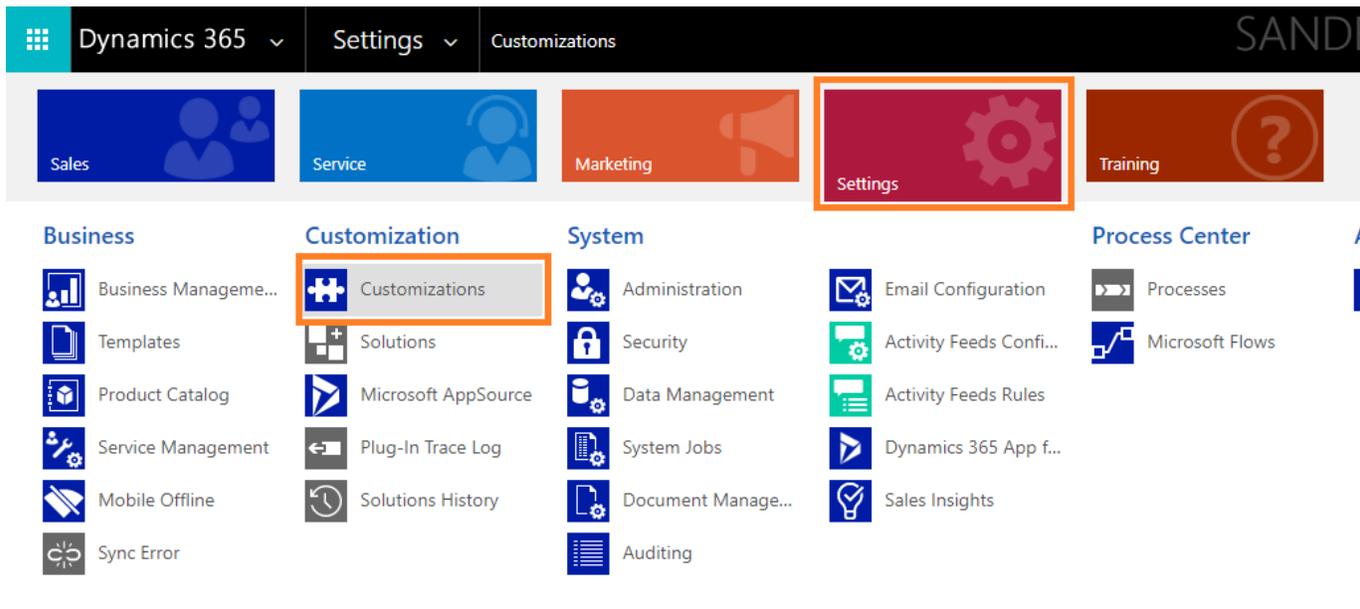
Process

Business process flows (fields will be created) †

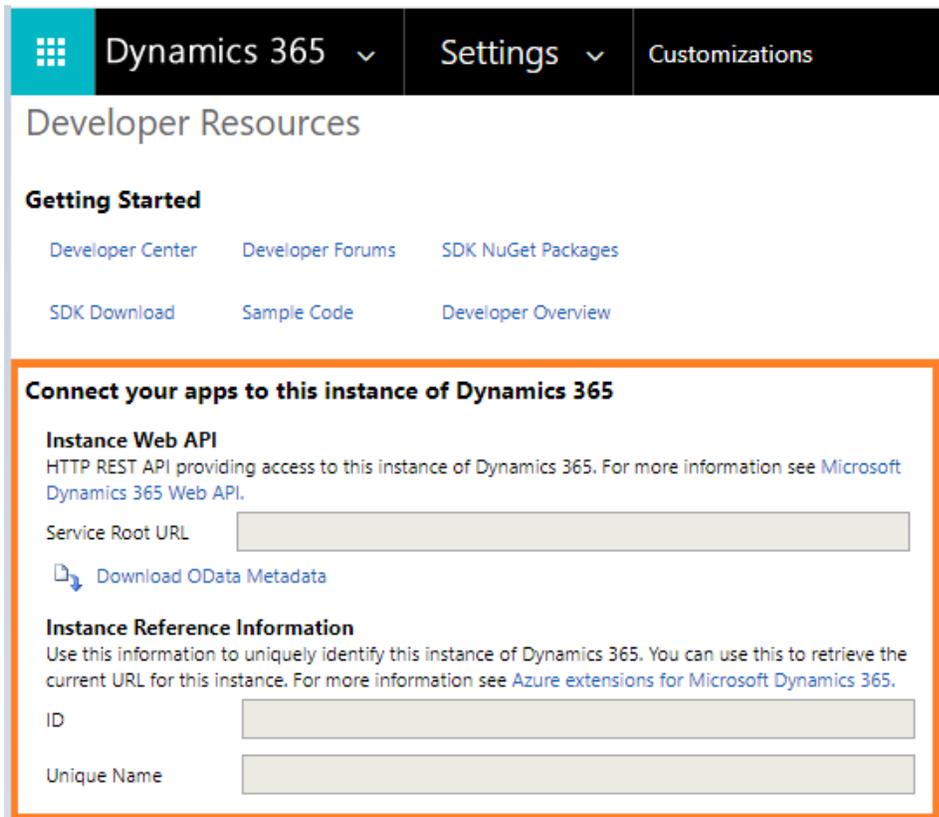
- g.
- h. It should have a name "new\_rmevent" and "Define as an activity entity." checkmark. The rest can be left with default values of set on you requirements.
- i. Choose "Save and close" on "File" menu
- j. Click on created entity and add fields:
  - new\_activitycode (Single Line of Text)
  - new\_activitysubcode (Single Line of Text)
  - new\_activitydate (Date and Time)
  - new\_activityid (Single Line of Text)
  - new\_categoryname (Single Line of Text)
  - new\_emailaddress (Single Line of Text)
  - new\_groupname (Single Line of Text)
  - new\_linklabel (Single Line of Text)
  - new\_linkurl (Single Line of Text)
  - new\_messagecategory (Single Line of Text)
  - new\_recipientid (Single Line of Text)

## Provisioning for Higher Logic

- 4) Higher Logic will need the following to leverage the Solution Package and the native Dynamics REST API.
  - a. Access the Dashboard > Settings > Customization > Developer Resources screen to provide to the provisioning details needed by Higher Logic to connect.



i. Instance Web API and Reference Information.



ii. As well as the following credentials

1. API User Login
2. API User Password
3. Client Secret - Security token for API User

## 5) Consent and Permission

Ensure that the user has access to this application. Selecting "Grant Permission" in the AD App under "Required Permissions" can provide the access required.

Home > Enterprise applications >

### Consent and permissions | User consent settings

Manage

- User consent settings
- Permission classifications

When a user grants consent to an application, the user can sign in and the application may be granted access to the organization's data. [Learn more about consent and permissions](#)

User consent for applications  
Configure whether users are allowed to consent for applications to access your organization's data. [Learn more](#)

- Do not allow user consent  
An administrator will be required for all apps.
- Allow user consent for apps from verified publishers, for selected permissions (Recommended)  
All users can consent for permissions classified as "low impact", for apps from verified publishers or apps registered in this organization.
- Allow user consent for apps  
All users can consent for any app to access the organization's data.

**Warning:** With your current user settings, all users can allow applications to access your organization's data on their behalf. [Learn more about the risks](#) Microsoft recommends allowing user consent only for verified app publishers or apps from your organization, for permissions you classify as "low impact". [Learn more](#)

Group owner consent for apps accessing data  
Configure whether group owners are allowed to consent for applications to access your organization's data for the groups they own. [Learn more](#)

- Do not allow group owner consent  
Group owners cannot allow applications to access data for the groups they own.
- Allow group owner consent for selected group owners  
Only selected group owners can allow applications to access data for the groups they own.
- Allow group owner consent for all group owners  
All group owners can allow applications to access data for the groups they own.

6) Here the admin can grant the consent through the portal as shown below from Home > App > API Permissions

