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.

🗰 Dynamics 365 🗸	Sales ~ Dashboards	; >		SAN	DB
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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

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μ μ συσπικάσι πώκαι	Areas that display this of Sales Settings Options for Entity Enable for interaction Process Business process for	entity Service Training re experience ws (fields will be created) +	Marketing	Insights	

- 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

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- 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.

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8	Business Manageme	Customizations	Administration	Email Configuration	Processes
	Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows
	Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules	
•⁄	Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App f	
Ň	Mobile Offline	Solutions History	Document Manage	Sales Insights	
¢	Sync Error		Auditing		

i. Instance Web API and Reference Information.

	Dynami	cs 365	~	Settings	~	Customizations
Dev	eloper Re	esource	es			
Gettin	ig Started					
Deve	loper Center	Developer F	orums	SDK NuGet Pack	ages	
SDK	Download	Sample Cod	le	Developer Oven	view	
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Uniqu	ie Name					

- 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.

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) User consent settings	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
Permission classifications	User consent for applications Configure whether users are allowed to consent for applications to access your organization's data. Learn more O 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.
	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 publishes or apps from your organization, for permissions you classify as 'low indext'. 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. Lear more
	O 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. Cinly selected group owners can allow applications to access data for the groups they own.
	Allow group owner consent for all group owners

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

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Home > MyKVApp	ermissions 🖈		
Search (Ctrl+/)	« 🕐 Refresh 🛛 🗢 Got feedback)	r.	
 Overview Quickstart Integration assistant Manage 	Configured permissions Applications are authorized to call AP all the permissions the application ne + Add a permission Grant a	Pls when they are reds. Learn more a idmin consent for	granted permissions by users/admins as part of the conser about permissions and consent az
🐸 Branding	API / Permissions name	Type	Description
Authentication	Acure Key Vault (1)		
🕇 Certificates & secrets	user_Impersonation	Delegated	Have full access to the Azure Key Vault service
11 Token configuration	Microsoft Graph (1)		
 API permissions 	UserRead	Delegated	Sign in and read user profile
Expose an API			

Do you want to grant consent for	the requested pe	ermissions for all accounts in az? This will update a	any existing admin consent r	ecords this application a	already has to	match what is listed by
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Applications are authon. Ho call A	Pls when they are	granted permissions by users/admins as part of the co	onsent process. The list of conf	igured permissions shoul	d include	
all the permissions the application in	eeds. Learn more a	bout permissions and consent				
🕂 Add a permission 🗹 Grant	admin consent for	82				
+ Add a permission 🗸 Grant API / Permissions name	admin consent for Type	az Description	Admin consent req	Status		
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