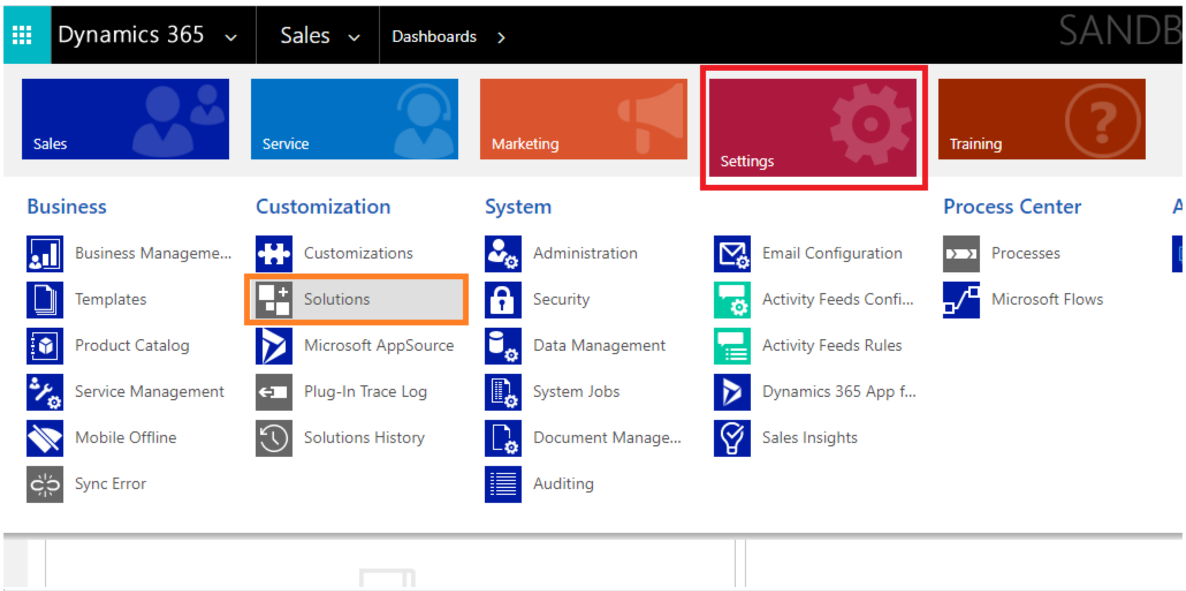
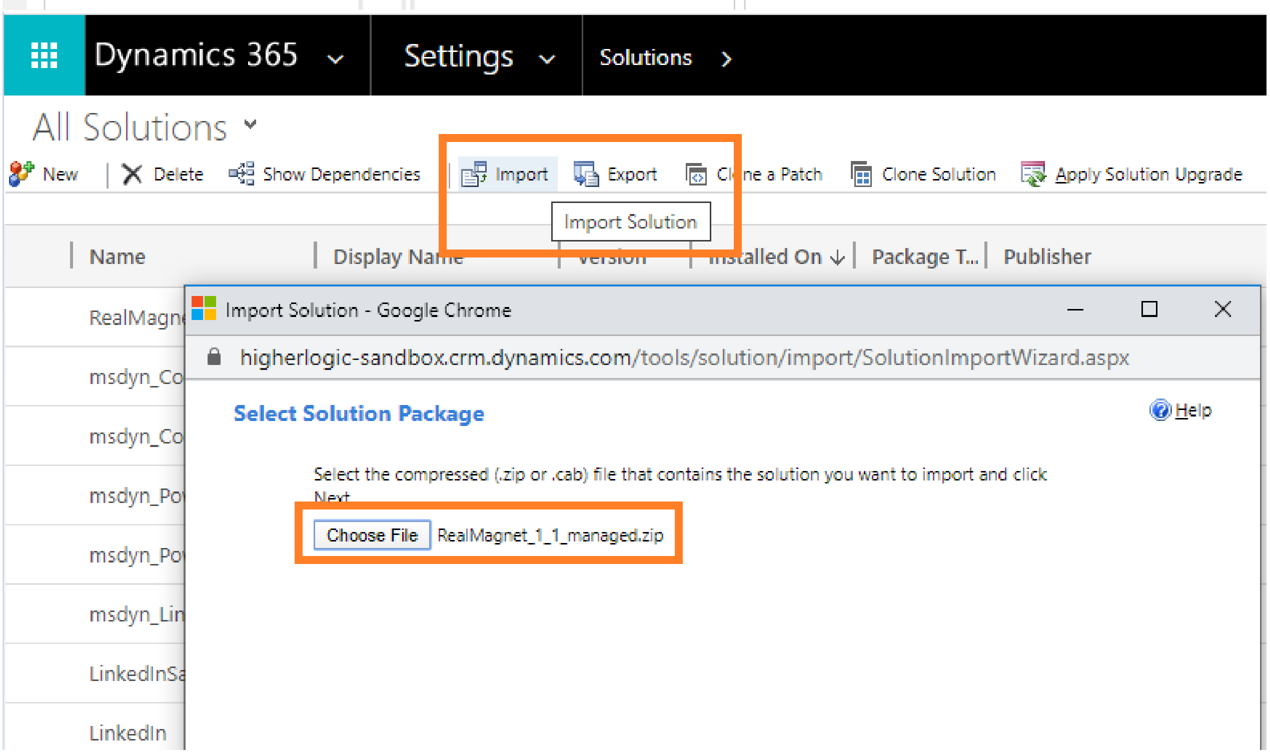
Higher Logic Microsoft Dynamics Integration

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

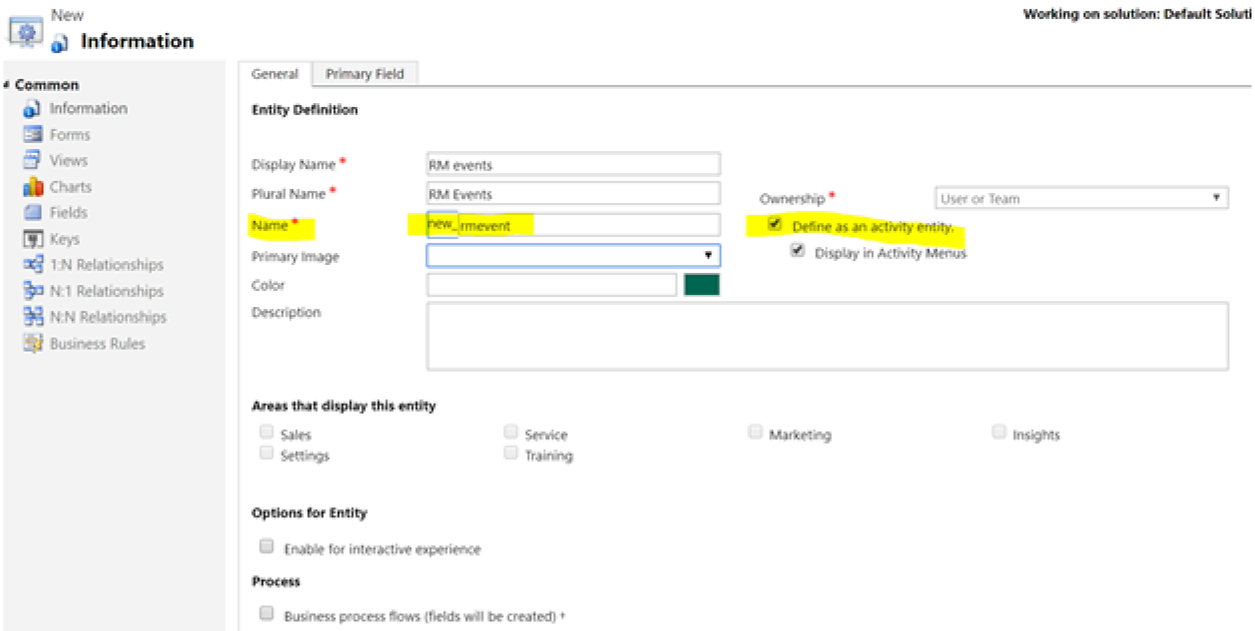
Install the Solutions Package

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.





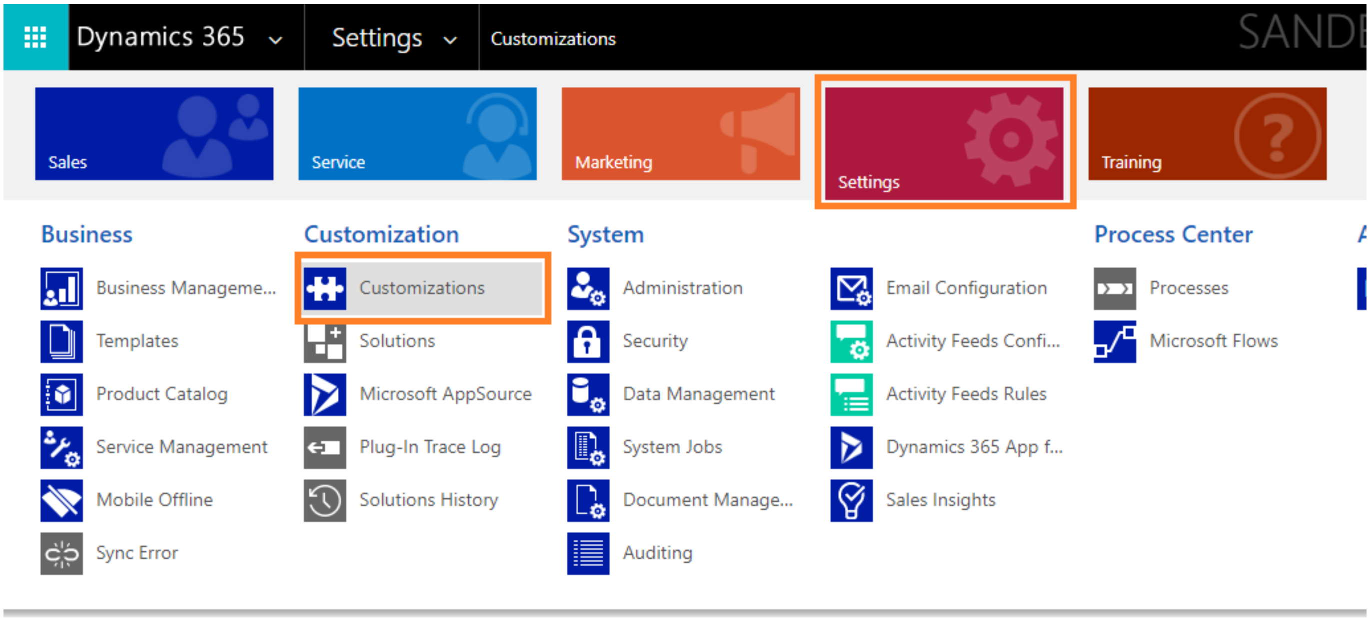
Tracking and Activity Component

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
    g. 

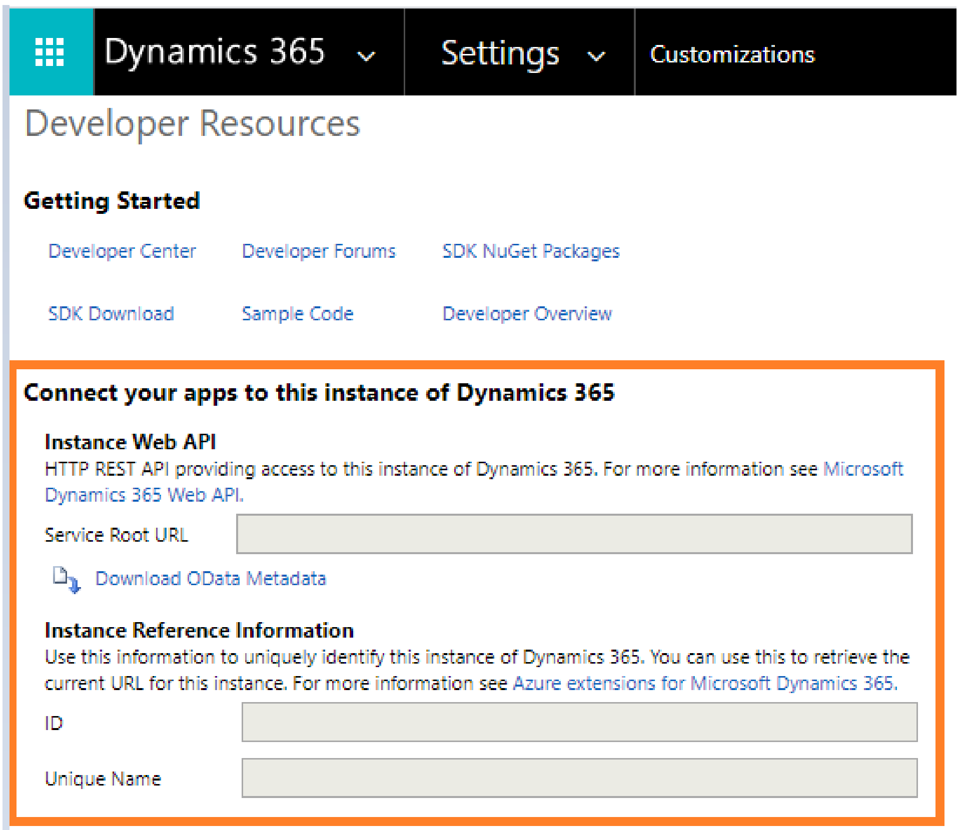
    h. It should have a name “new_rmevent” and “Define as an activity entity.” checkmark. The rest can be left with default values of set on you requirements.
    i. Choose “Save and close” on “File” menu
    j. Click on created entity and add fields:
    new_activitycode (Single Line of Text
    new_activitysubcode (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.



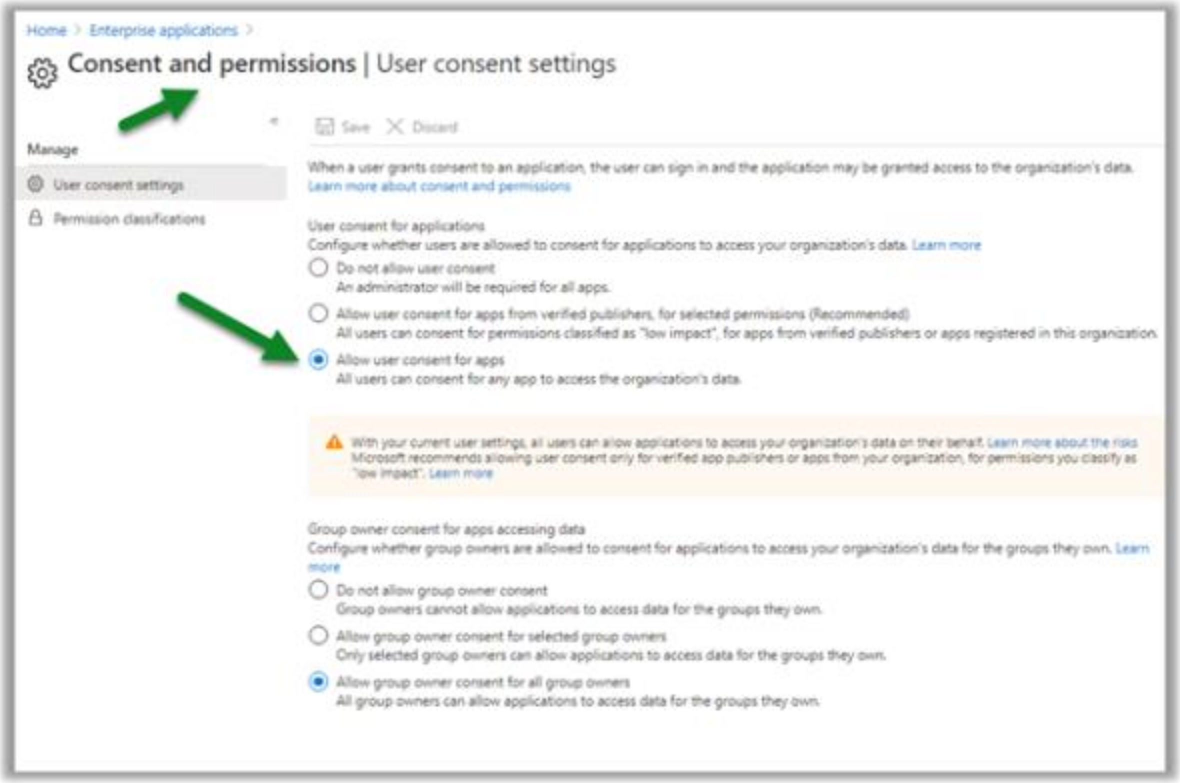
i. Instance Web API and Reference Information.



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.



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