

5.3 Microsoft Dynamics 365 Integration

Bright Pattern Documentation

Generated: 11/29/2021 6:25 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
Reference: How to Add an Integration Account	3
Step 1: Add new account	3
Step 2: Edit properties	4
Type	4
Name	4
Default account	4
Authorization URL	4
Token URL	5
API URL	5
Client ID	5
Client Secret	5
Refresh token	5
Test connection	5
Step 3: Save!	5

Reference: How to Add an Integration Account

Connections to Microsoft Dynamics 365 apps and data are established through integration accounts.

This section describes how to add your Microsoft credentials to a new Microsoft Dynamics 365 integration account in Bright Pattern's Contact Center Administrator application.

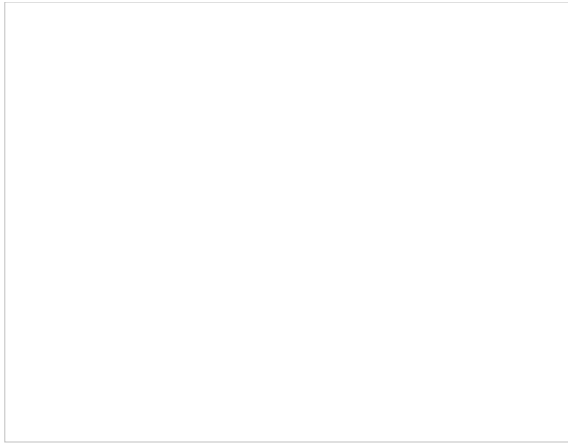
For more information, see the *Contact Center Administrator Guide*, section [Microsoft Dynamics 365 Integration](#).

Dynamics-Conf-23-54.PNG



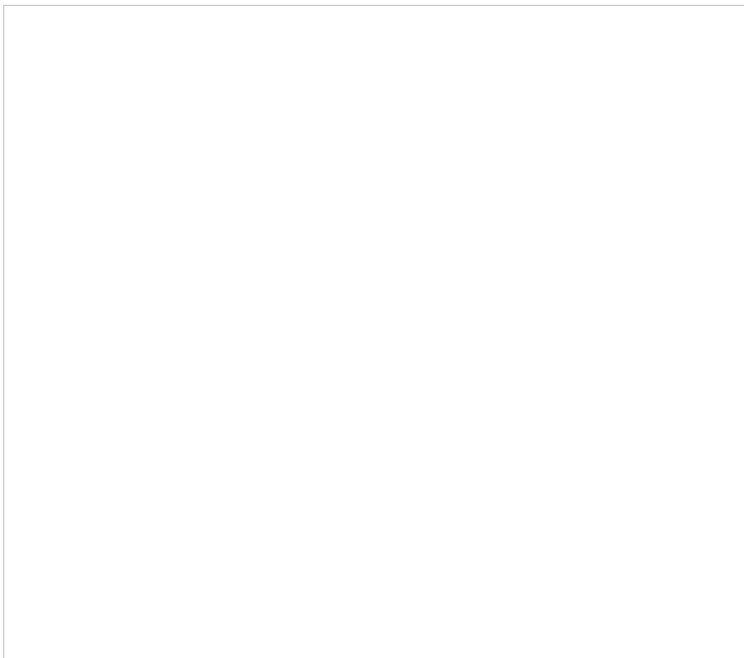
Step 1: Add new account

1. In *Contact Center Administrator* > *Integration Accounts*, add an integration account of type **Microsoft Dynamics 365**.



Select integration account type

Step 2: Edit properties



Microsoft Dynamics 365 integration account properties

Type

By default, "Microsoft Dynamics 365" because this is the type of integration account you are creating

Name

The unique name (any) of the account

Default account

Because it is possible to have multiple integration accounts of this type, select this checkbox to enable this account as the default

Authorization URL

The OAuth 2.0 authorization endpoint (v1) of your registered app in the Azure portal

Token URL

The OAuth 2.0 token endpoint (v1) of your registered app in the Azure portal

API URL

The URL of Microsoft's Web API, including your instance name in the following format:

`https://<your-Microsoft-organization-domain>.crm.dynamics.com/api/data/v9.0`

For example:

<https://brightpatterndev.crm.dynamics.com/api/data/v9.0>

Client ID

The application (client) ID of your registered app in the Azure portal

Client Secret

The client secret (i.e., app key) of your registered app in the Azure portal

Refresh token

Authenticates your Microsoft account and allows you to consent on behalf of your organization

Test connection

Tests the connection between Bright Pattern and Microsoft

Step 3: Save!

Click **Apply** to save your changes. This completes the process of adding a Microsoft Dynamics 365 integration account.