



## 5.8 Microsoft Dynamics 365 Integration

### Bright Pattern Documentation

Generated: 8/08/2022 3:42 pm

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](#).

The screenshot shows the 'Integration Accounts >> Dynamics >> Properties' page in the Contact Center Administrator application. The left sidebar contains a navigation menu with 'Integration Accounts' selected. The main area displays a table of integration accounts and a 'Properties' panel for the selected 'Dynamics' account.

Name	Type
CupIQ General Bot	Bot / Chat suggestions en...
CupIQ NLU	Natural Language Underst...
CupIQ SFDC Lightning	Salesforce.com
CupIQ STT	Speech To Text (Watson)
CupIQ Twitter	Messenger (Twitter)
Dynamics	Microsoft Dynamics 365
Zapier CupIQ	Zapier

The 'Properties' panel for the 'Dynamics' account shows the following configuration:

- Type: Microsoft Dynamics 365
- Name: Dynamics
- Default account:
- Authorization URL:
- Token URL:
- API URL:
- Client ID:
- Client Secret:
- Refresh token:
- 

Buttons at the bottom of the panel include '+', 'x', 'Apply', and 'Reset'.

## Step 1: Add new account

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

### Create integration account

- Amazon AWS
- Bot / Chat suggestions engine
- Enterprise Messenger
- External Knowledge Base
- LoxySoft WFM
- Messenger
- Microsoft Dynamics 365
- NICE
- Natural Language Understanding

Select integration account type

## Step 2: Edit properties

**Properties**

Type	Microsoft Dynamics 365
Name:	<input type="text" value="Bright Pattern"/>
Default account:	<input type="checkbox"/>
Authorization URL:	<input type="text" value="https://login.microsoftonline.com/"/>
Token URL:	<input type="text" value="https://login.microsoftonline.com/"/>
API URL:	<input type="text" value="https://brightpatterndev.crm.dyna"/>
Client ID:	<input type="text" value="755fe1f2-4c29-466d-abe5-a117cc34"/>
Client Secret:	<input type="password" value="....."/>
Refresh token	<input type="password" value="....."/> <input type="button" value="Request token"/>
	<input type="button" value="Test connection"/>

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.