

# MS Dynamics connector: Installation guide



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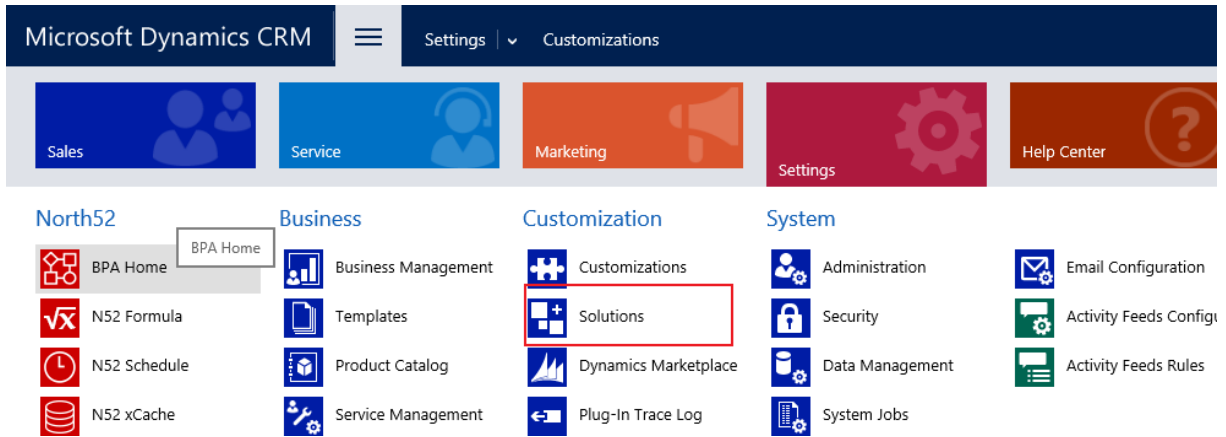
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# 1. Download and Install the Package

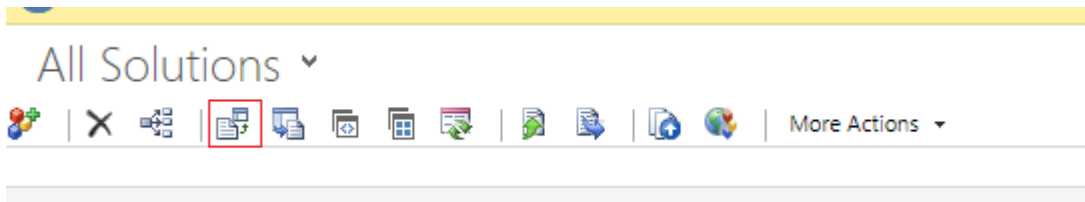
Download the last version of the connector from [this link](#):

 <http://bit.ly/3kui8VA> 

To install it, you need to go to the Settings > Solution. Install it from Settings > Solutions.



From there, you will be able to import solutions, such as the Touch & Sell one you just downloaded, by clicking the following button:



Then follow the instructions.

**IMPORTANT:** Once the import of the solution is complete, make sure to publish all the customizations in order to see the elements of the Touch & Sell connector appear.

## 2. Setting up the connector

### a) Enter your CRM information

To allow the connection between your Dynamics account and Touch & Sell, the following details must be sent to [our Support Team](#):

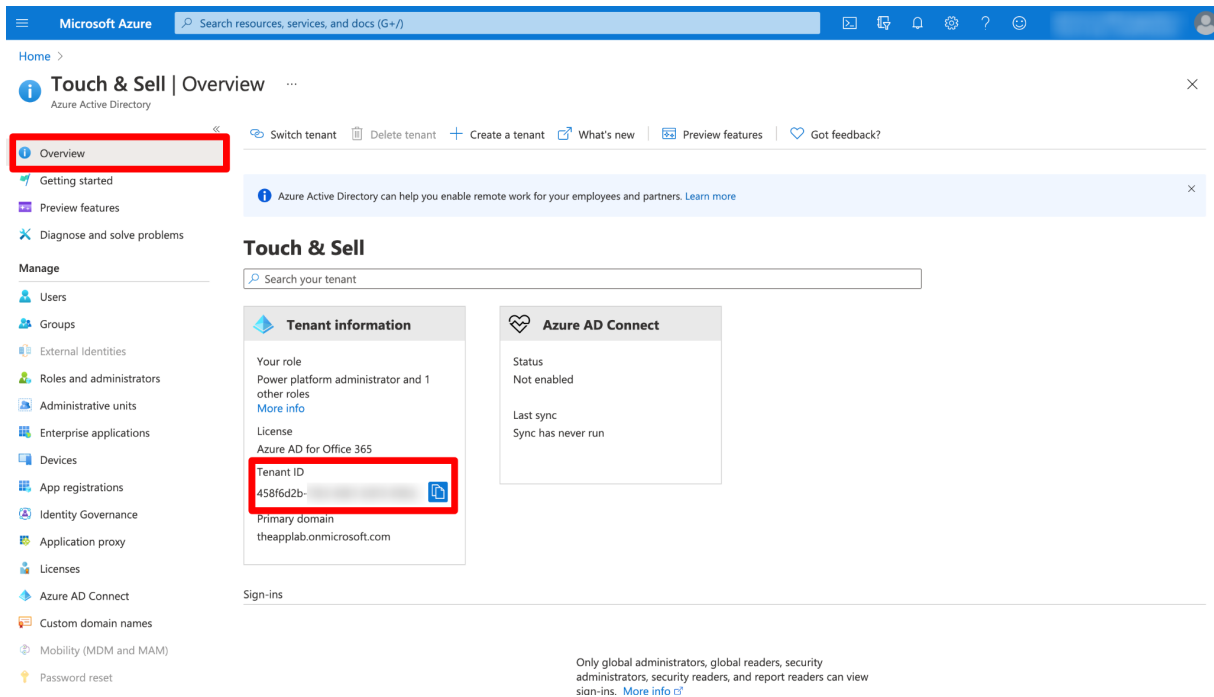
1. Tenant ID - Azure Active Directory
2. Application (client) ID
3. Client secret
4. The URL of the environment

We will complete the required steps on our side and let you know once it is done.

*\*Please note, if you are doing your tests on a testing environment, you must send us the production URL as well when you are ready to go live, so that we can make the modification on our side.*

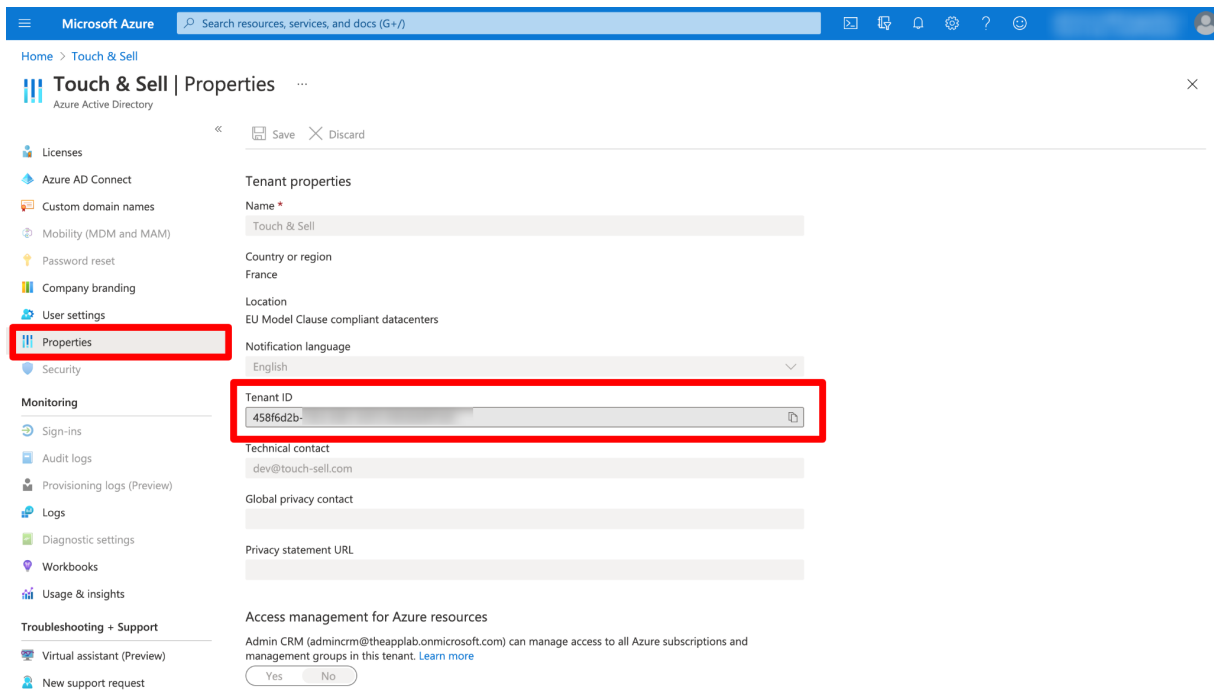
## 1. How to get your organization's Tenant ID from Azure Active Directory?

You can easily find your Tenant ID from your Azure organization's home page.



The screenshot shows the Microsoft Azure portal interface. The top navigation bar includes the Microsoft Azure logo, a search bar, and various utility icons. The main content area is titled "Touch & Sell | Overview" under the "Azure Active Directory" section. A left-hand navigation menu lists various management options, with "Overview" highlighted in a red box. The main content area displays "Touch & Sell" information, including a search bar and two panels: "Tenant information" and "Azure AD Connect". The "Tenant information" panel shows details such as "Your role", "License", and "Tenant ID". The "Tenant ID" field, which contains the value "458fd2b-...", is highlighted with a red box. The "Azure AD Connect" panel shows "Status" as "Not enabled" and "Last sync" as "Sync has never run".

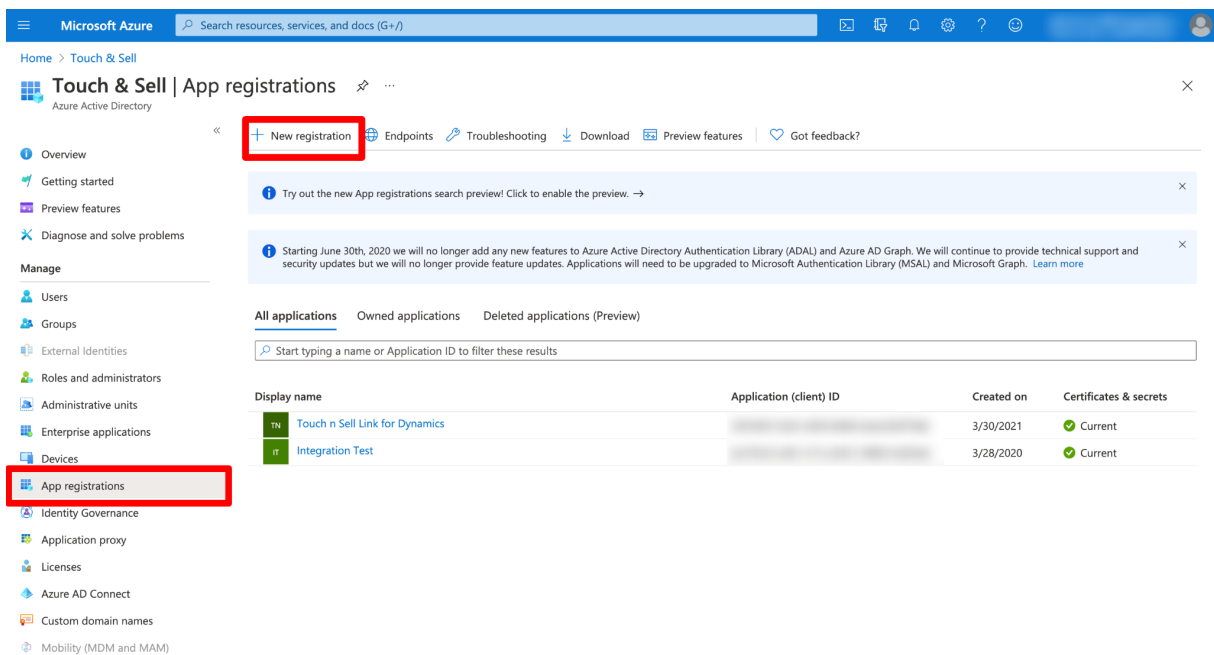
If you can't find it, scroll down in your left menu until you find the Properties page. Click and you will find your Tenant ID.



## 2. How to get the Application (client) ID and the Secret Client?

You first need to authorize the Touch & Sell application to connect to your organization. The Application (client) ID and the Secret Client will be the identifiers that your Touch & Sell application will use to connect to your CRM.

First, you must go to the "App registrations" page( in your left menu). Then, click on "New Registration".



Then, to confirm the registration of your application you have to :

- Name your application: we advise you to use the name "Touch and Sell for MS Dynamics" so it is easily identifiable. (Azure does not accept the symbol "&".)
- Set the authentication url with Touch & Sell :  
<https://touch-sell-prod.herokuapp.com/dynamics/oauth/callback>

Microsoft Azure Search resources, services, and docs (G+)

Home > Touch & Sell >

## Register an application

\* Name

The user-facing display name for this application (this can be changed later).

Touch and Sell Link for MS Dynamics

Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Touch & Sell only - Single tenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Personal Microsoft accounts only

Help me choose...

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web https://touch-sell-prod.herokuapp.com/dynamics/oauth/callback

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise applications](#).

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

Once the application is saved, Azure will automatically generate the application (client) ID that you must provide to the T&S team.

Microsoft Azure Search resources, services, and docs (G+)

Home > Touch & Sell >

## Touch n Sell Link for Dynamics

Search (Cmd+) Delete Endpoints Preview features

Overview

- Quickstart
- Integration assistant

Manage

- Branding
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- Token configuration
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- Owners
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- Manifest

Support + Troubleshooting

- Troubleshooting
- New support request

Essentials

Display name	: Touch n Sell Link for Dynamics	Supported account types	: My organization only
Application (client) ID	: [REDACTED]	Redirect URIs	: 1 web, 0 spa, 0 public client
Directory (tenant) ID	: [REDACTED]	Application ID URI	: Add an Application ID URI
Object ID	: 3be4001f-e39a-456f-8eb8-92405e8a5104	Managed application in L...	: Touch n Sell Link for Dynamics

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

Get Started Documentation

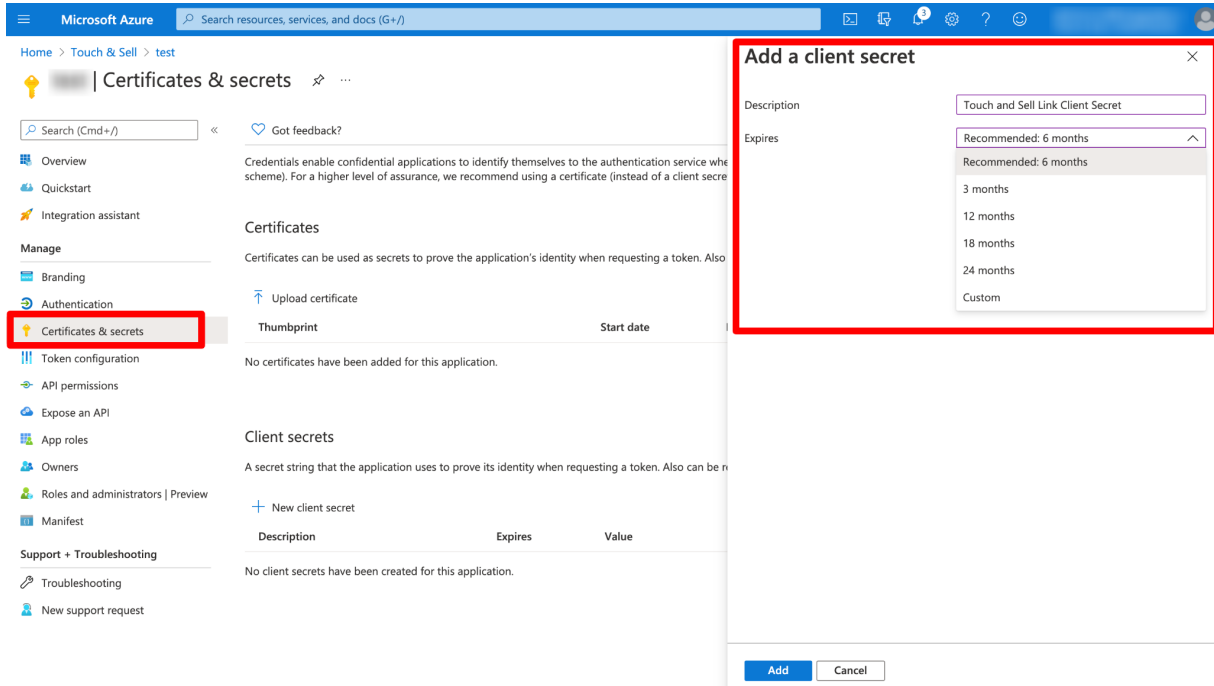
### Build your application with the Microsoft identity platform

The Microsoft identity platform is an authentication service, open-source libraries, and application management tools. You can create modern, standards-based authentication solutions, access and protect APIs, and add sign-in for your users and customers. [Learn more](#)

Next step is to generate the Client Secret (key) that your application uses to authenticate with Dynamics. You can do this by clicking on the "Certificates & secrets" page located in the left menu.

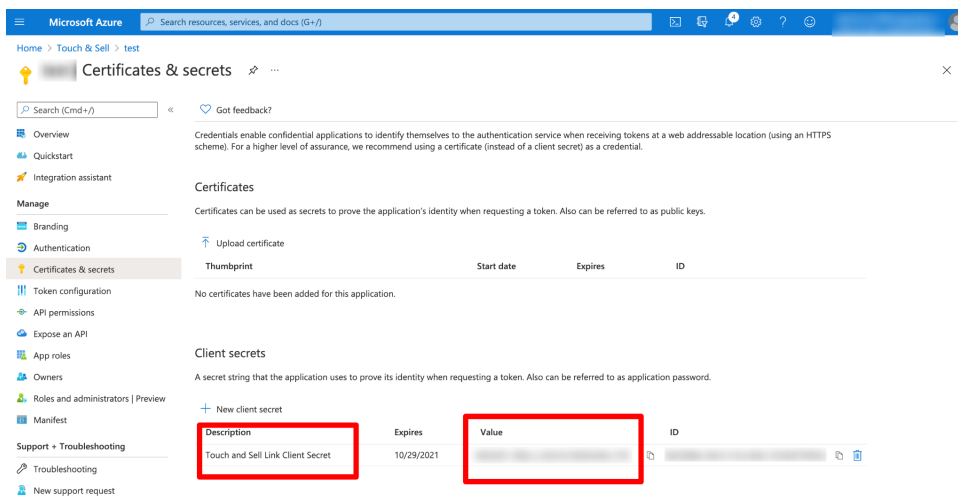
Give the Secret Client an easily identifiable name and an expiration date.

**Warning:** once the key expires, you will need to generate a new one and communicate it to the Touch & Sell support team.



Once you have added your Secret Client, the value of your key will be automatically generated by Azure and you can get it from the following page.

**Warning:** copy your key value immediately and share it with [Touch & Sell](#). Once you exit this page, you will not be able to retrieve the value for security reasons.



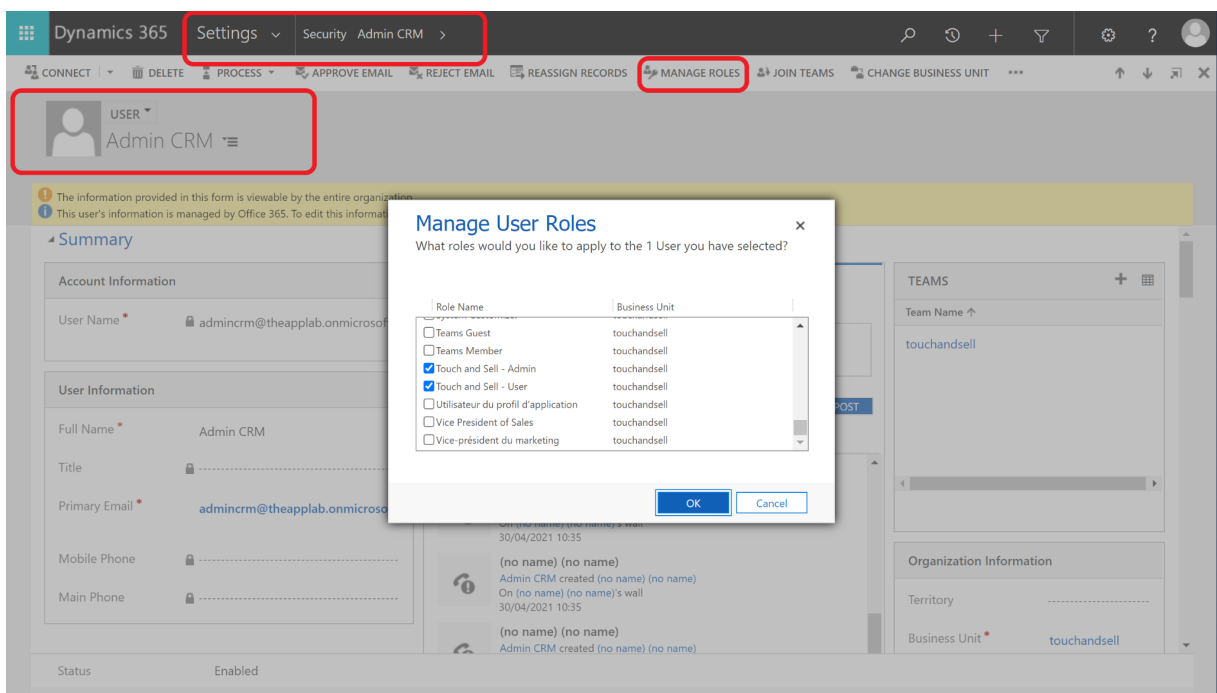
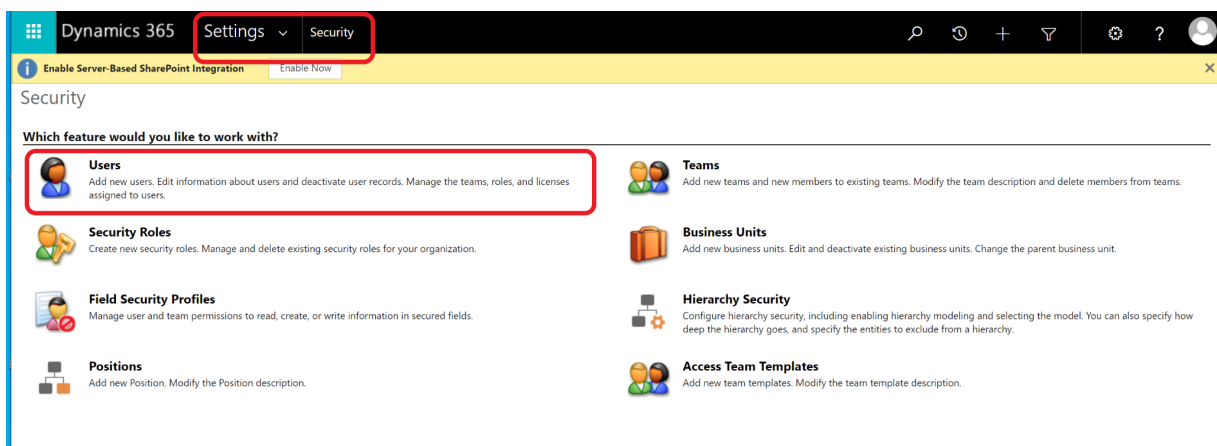
If you do not have access to these details, please contact your Azure administrator.

## b) Security roles assignments

Now, in order to access the entities of the solution, you need to assign the specific roles of the Touch & Sell solution on the Ms Dynamics settings.

Two new roles are available:

- Touch and Sell - Admin: access to the settings entity in order to configure the connector (to be assigned before taking the next step)
- Touch and Sell - User: access to the Document Sharings, Shared documents and downloads Events.

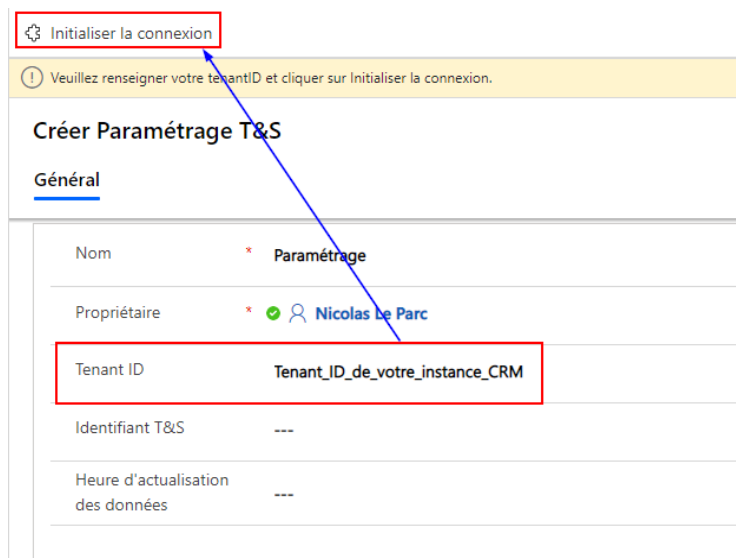


### c) Setting up the T&S Setup entity

Finally, you will need to configure the "T&S Setup" entity. To do this:

1. Create a new record for this entity and give it a name (as you like).
2. Then fill in your Tenant ID (information to be retrieved from Azure).  
*If you do not have access to this information, please contact your Azure administrator.*
3. Save.
4. Click on the "Initialize the connection" button.

Data refresh time is the time of the first synchronization. It is not retroactive meaning that if you set up the connector at 4pm and specify 2pm as the synchronization time, the first synchronization will start the next day at 2pm. Thereafter, the connector will synchronize every 10 minutes.



The screenshot shows a user interface for configuring a T&S connector. At the top, there is a button labeled "Initialiser la connexion" with a refresh icon, highlighted by a red box. Below it is a yellow warning banner that says "Veuillez renseigner votre tenantID et cliquer sur Initialiser la connexion." The main form is titled "Créer Paramétrage T&S" and has a "Général" tab selected. The form contains several fields: "Nom" with the value "Paramétrage", "Propriétaire" with the value "Nicolas Le Parc", "Tenant ID" with the value "Tenant\_ID\_de\_votre\_instance\_CRM" (highlighted by a red box), "Identifiant T&S" with a placeholder "---", and "Heure d'actualisation des données" with a placeholder "---". A blue arrow points from the "Initialiser la connexion" button to the "Tenant ID" field.

A new page pops up to initialize the connector. When closing the page, you are back on the Touch & Sell settings page. You now need to set up:

#### - The Touch & Sell ID :

It is the token created from your Touch & Sell Studio > Organization tab > connectors > API Keys > Create a new API Key.

- As "Name" we suggest you to choose something explicit as "Dynamics connector".
- "Client" is the app you are trying to connect.
- Then click the button to Add the API Key.

#### - The Data refresh time :

This is the time of the first synchronization. It is not retroactive meaning that if you set up the connector at 4pm and specify 2pm as the synchronization time, the first synchronization will start the next day at 2pm. Thereafter, the connector will synchronize every 10 minutes.

### 3. Use of the connector

Once the installation is completed, authorized users will have access to the following information:

- Document Sharings
- Shared Documents
- Downloading Events

These records will be updated at a time specified during the configuration of the solution.

Information are also linked to standard Dynamics 365 CRM items:

- Prospect
- Opportunity
- Contact
- Account

### 4. Contact

For any further information, please send an email at [support@touch-sell.com](mailto:support@touch-sell.com)