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Connection Dialog – Microsoft Dynamics 365

May 2023

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1. General information

To use our products, it's necessary to establish a connection with Microsoft Dynamics 365. You can do this by utilizing the Dynamics 365 Connection Setup during the installation of our solutions, which enables you to both, define a connection to Dynamics 365 and manage your existing connection(s).

Within the setup, you'll be able to choose your Dynamics 365 deployment Type and authentication method. This dialog provides you with a comprehensive overview of your connection status and settings.

Logon information - DocumentsCorePack Client (10.42)

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles [HKCU] TestCon1 Manage New

Select your Dynamics 365 Type

OnPremise
 IFD/Hosted
 Online
 AppAccess

Dynamics 365 Server-Url:

https://org[redacted].crm4.dynamics.com ✓

Authenticated as:

Prefer Server2Server authentication

Server to server authentication enabled! Click on <Retrieve all Organization> to continue.
Note, that a separate authentication window from Microsoft Dynamics appears.
You must complete the logon and consent process to continue.

Retrieve all

Organization information:

Friendly name	Unique name	ServiceURL
CRM [redacted]	un[redacted] e...	https://org[redacted].crm4.dynamics.com/XRMServic...

OK Cancel

Figure 1: Dynamics 365 Connection Setup

2. The Dynamics 365 Connection Tab

2.1. Existing profiles

If you've previously connected to this Dynamics 365 organization, an **1** Existing Profile will be available. You can choose this profile, and all the relevant information will automatically be filled in. All you need to do is wait until the process is complete. In this case, one or more organizations appear in the **2** "Organization Information" section located at the bottom of the dialog box. The target organization will be highlighted in gray.

Once you've confirmed that the correct organization is selected, you can proceed by clicking on the **3** **OK** button. If this is a new installation or you want to connect to a different organization, follow the next steps.

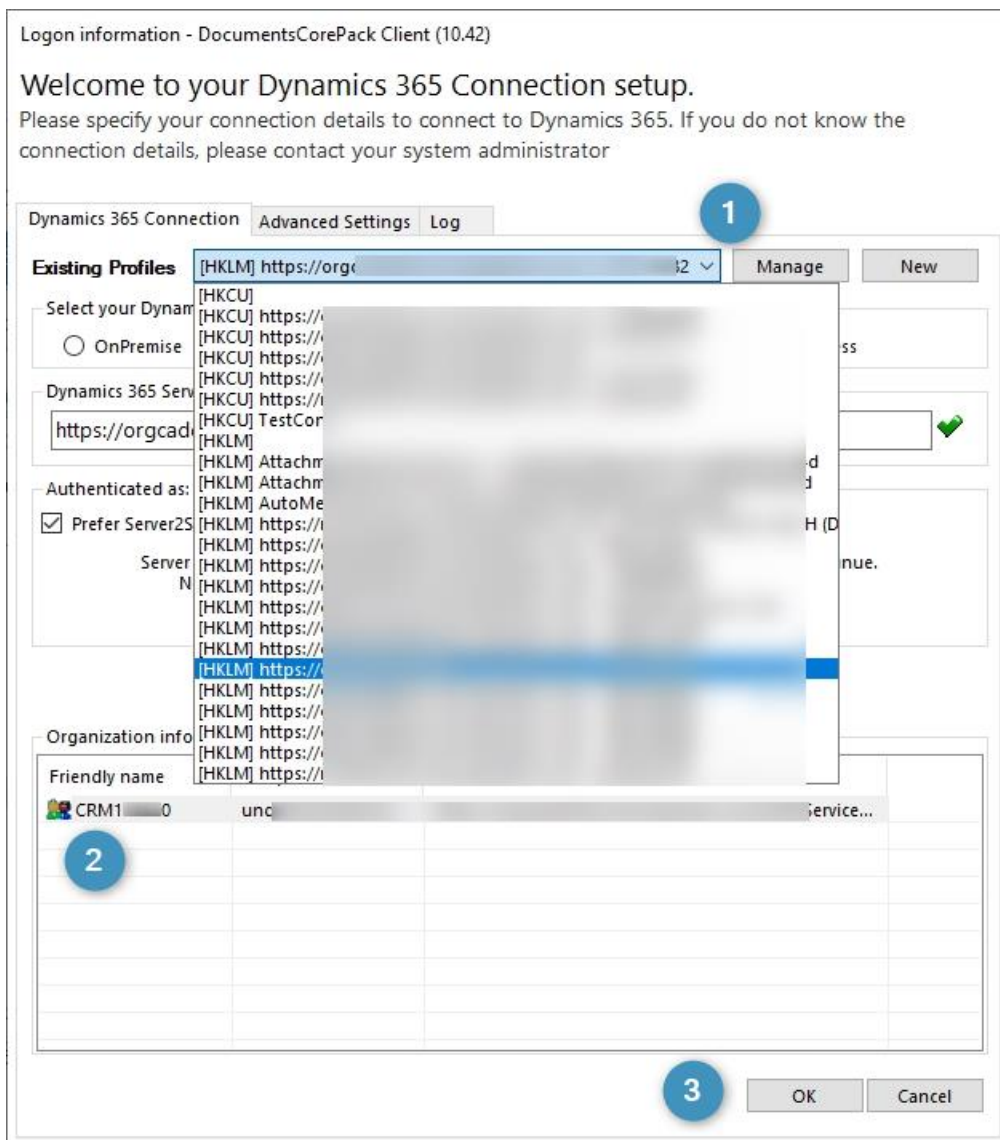


Figure 2: Organization overview by hitting the Existing Profiles drop-down

2.2. Provide connection information

Depending on the type of your Dynamics 365 organization you have to select between **1 OnPremise**, **2 IFD/Hosted**, **3 Online**, and **4 AppAccess**.

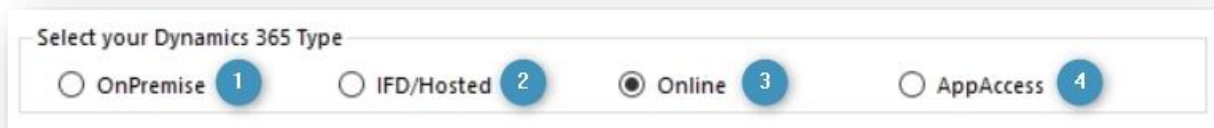


Figure 3: Dynamics 365 types

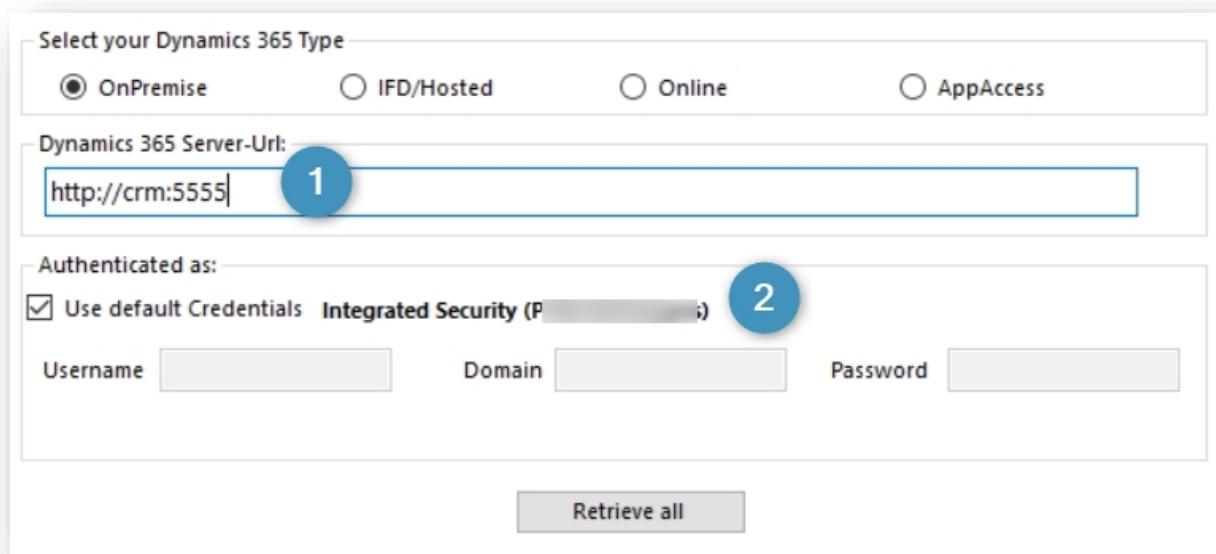
1 OnPremise: On premise Dynamics 365 is installed and run on computers on your premises, not at a remote facility.

Please note: Per default, the Dynamics 365 Server URL is empty, and you must enter your Dynamics Server URL.

The screenshot displays an example of a correctly filled Dynamics 365 Server URL. In our example, we use **1 port:5555**. If you do not have a port, the system uses the standard port:80 in the background. Standard Dynamics 365 most likely run with http:// protocol.

If you check the default credentials check box, Microsoft Windows will use **2 Integrated Security** and log you in with your user login. If you uncheck the default credentials check box, you must enter your username, domain, and your password manually

Please note: By entering the port, please make sure that you use the right protocol (**http:// or https://**)!



Select your Dynamics 365 Type

OnPremise IFD/Hosted Online AppAccess

Dynamics 365 Server-Url:

http://crm:5555

Authenticated as:

Use default Credentials Integrated Security (P ;)

Username Domain Password

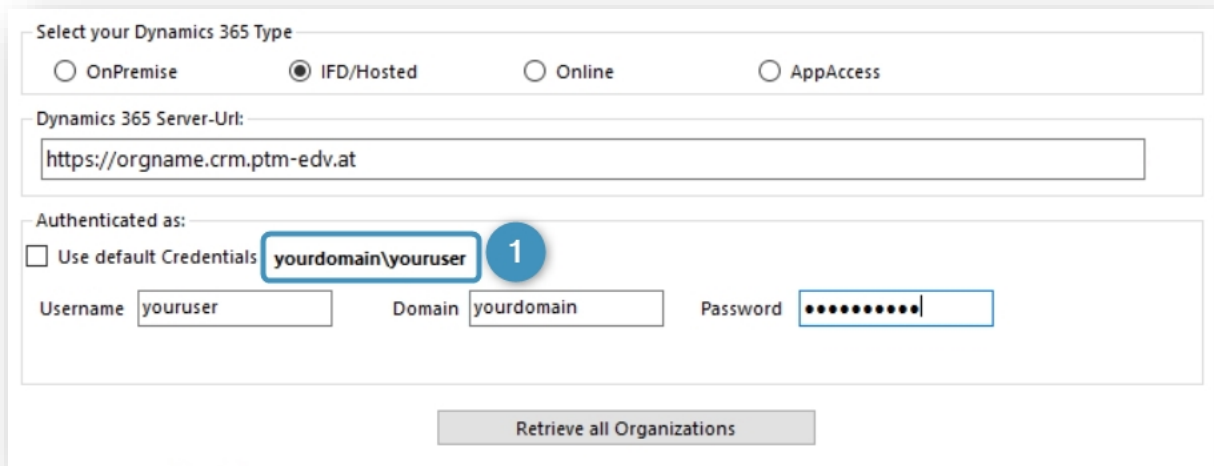
Retrieve all

Figure 4: Select Dynamics 365 Type – OnPremise

2 IFD/Hosted: If IFD hosted, your Dynamics 365 is connected via ADFS, a software component that provides users with single sign-on access to systems and/or applications located across organizational boundaries. The login via Integrated Security **Use default Credentials** option is not possible in combination with IFD/Hosted.

There are two options to enter your credentials in case you use an IFD-hosted Dynamics 365:

1. Enter your **1 username and your domain extra**. Depending on your IFD Host, it could happen, that you are provided with an error message when you enter your credentials this way. To avoid this error, please, enter them the way it is shown in option 2.



Select your Dynamics 365 Type

OnPremise IFD/Hosted Online AppAccess

Dynamics 365 Server-Url:

https://orgname.crm.ptm-edv.at

Authenticated as:

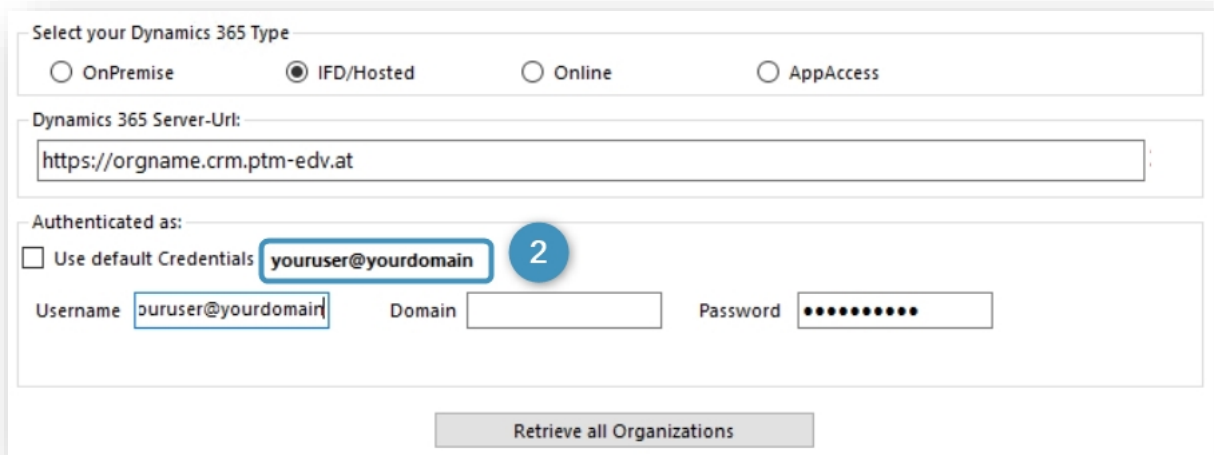
Use default Credentials **yourdomain\youruser** 1

Username youruser Domain yourdomain Password

Retrieve all Organizations

Figure 5: IFD/Hosted – username and domain extra

2. Enter your **2** **username + @ + your domain** in the field Username (see Figure 5) and leave the field Domain blank. Do not forget to enter the password!



Select your Dynamics 365 Type

OnPremise IFD/Hosted Online AppAccess

Dynamics 365 Server-Url:

https://orgname.crm.ptm-edv.at

Authenticated as:

Use default Credentials **youruser@yourdomain** 2

Username youruser@yourdomain Domain Password

Retrieve all Organizations

Figure 6: IFD/Hosted – Username and domain together

Please note: Do not forget to enter the port (if you use one) and pay attention to the protocol! IFD solutions are very often connected with **https://** protocol! Basically, you could also enter http:// protocol, but the Dynamics 365 connection would not work!

3 Online: If your Dynamics 365 is an online version , the default authentication method is **Server2Server**.

After hitting the **Retrieve all** button, a **Login** is required. Enter the credentials you intend to use to connect to Dynamics 365 but please consider that administration rights are required!

Click on the organization which appears in the **Organization information** window and confirm with **OK**.

Select your Dynamics 365 Type

OnPremise
 IFD/Hosted
 Online
 AppAccess

Dynamics 365 Server-Url:

✔

Authenticated as:

Prefer Server2Server authentication

1

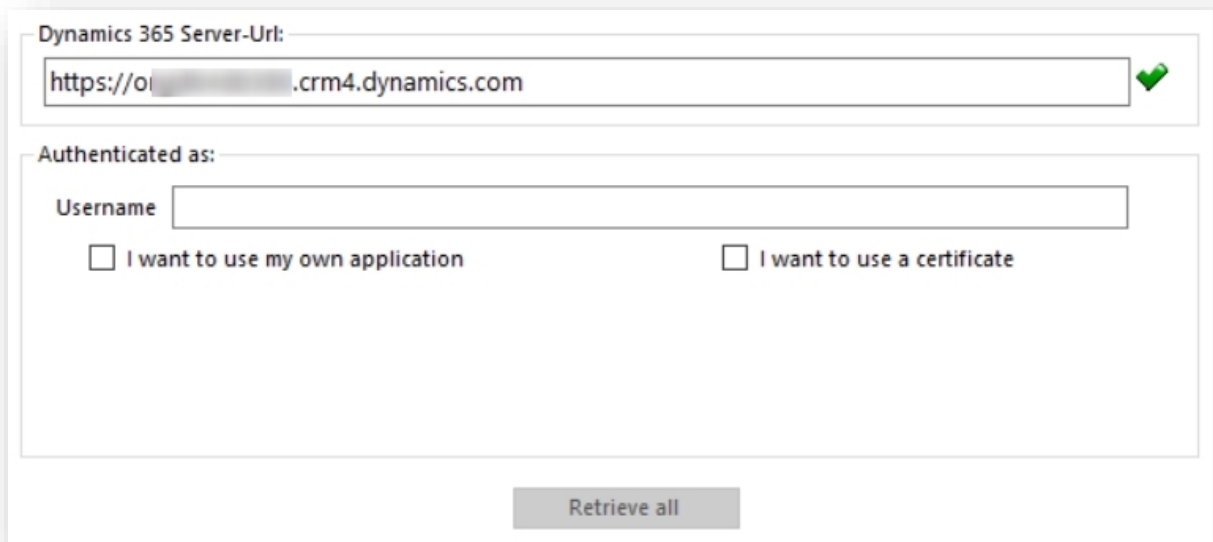
Server to server authentication enabled! Click on <Retrieve all Organization> to continue.
 Note, that a seperate authentication window from Microsoft Dynamics appears.
 You must complete the logon and consent process to continue.

Organization information:

Friendly name	Unique name	ServiceURL
CRM 2	un_...	https://or_...crm4.dynamics.com/XRMServic...

Figure 7: Online - Preset data if organization exist

4 AppAccess: Requires an **mscrm-addons.com Application User for Dynamics 365**. Learn how this works and how you can use this user to connect via DocumentsCorePack online service in this [blog article](#).



The screenshot shows a configuration window for AppAccess. It features a text input field for the Dynamics 365 Server-Url, which contains the value "https://o1[redacted].crm4.dynamics.com" and a green checkmark icon. Below this is a section titled "Authenticated as:" containing a "Username" input field. At the bottom of this section are two checkboxes: "I want to use my own application" and "I want to use a certificate". A "Retrieve all" button is located at the bottom center of the window.

Figure 8: AppAccess

2.3. Retrieve organization(s)

If your credentials were entered properly, you can proceed.

- 1 Hit the **Retrieve all** button and get a list of all available organizations.
- 2 Receive the **Organization information** listing all organizations available to the given user. Select the organization and confirm with **3 OK**.

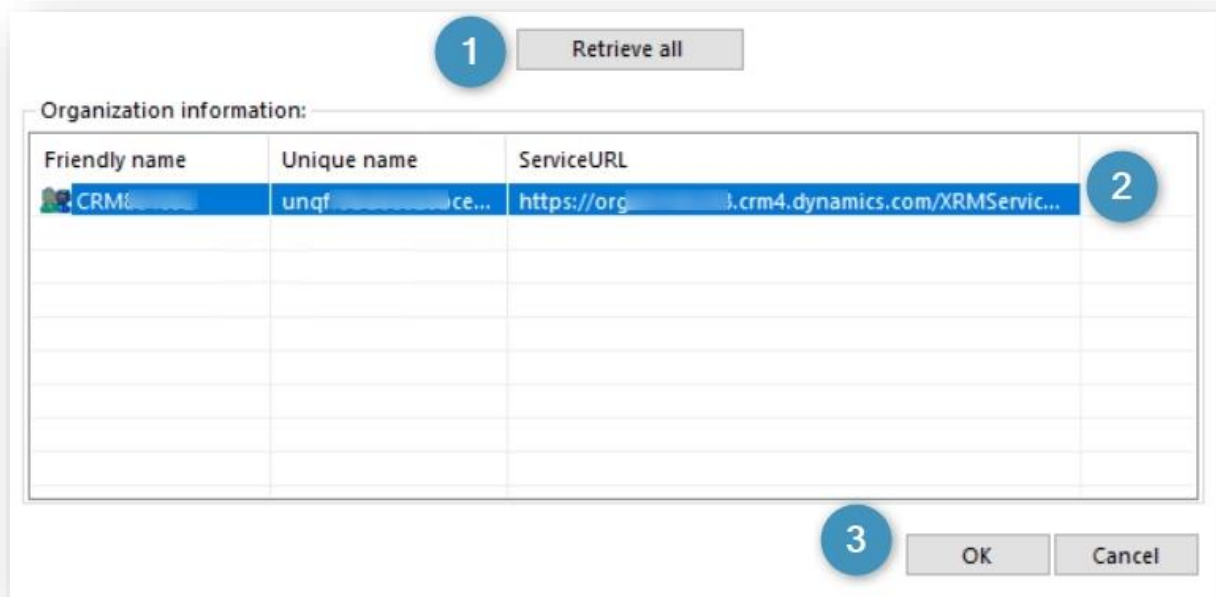


Figure 9: Retrieved organization

2.4. Common logon errors

1. This connection did not discover any Organizations!

To solve this issue, please recheck your Dynamics 365 Server-URL and the protocol. Should the error persist, please navigate to the **Log** tab and mail the whole content to our [support team](#).

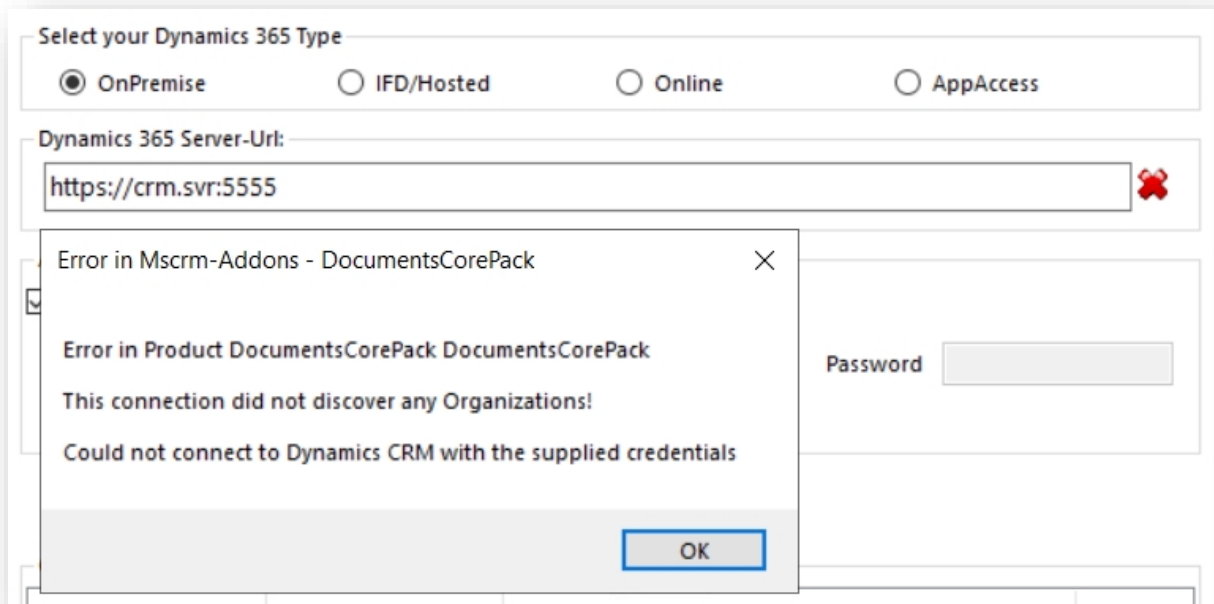


Figure 10: Logon error #1

The credentials for your user caused an authentication failure.

To solve this issue, please recheck your credentials. Should the error persist, please contact our [support team](#).

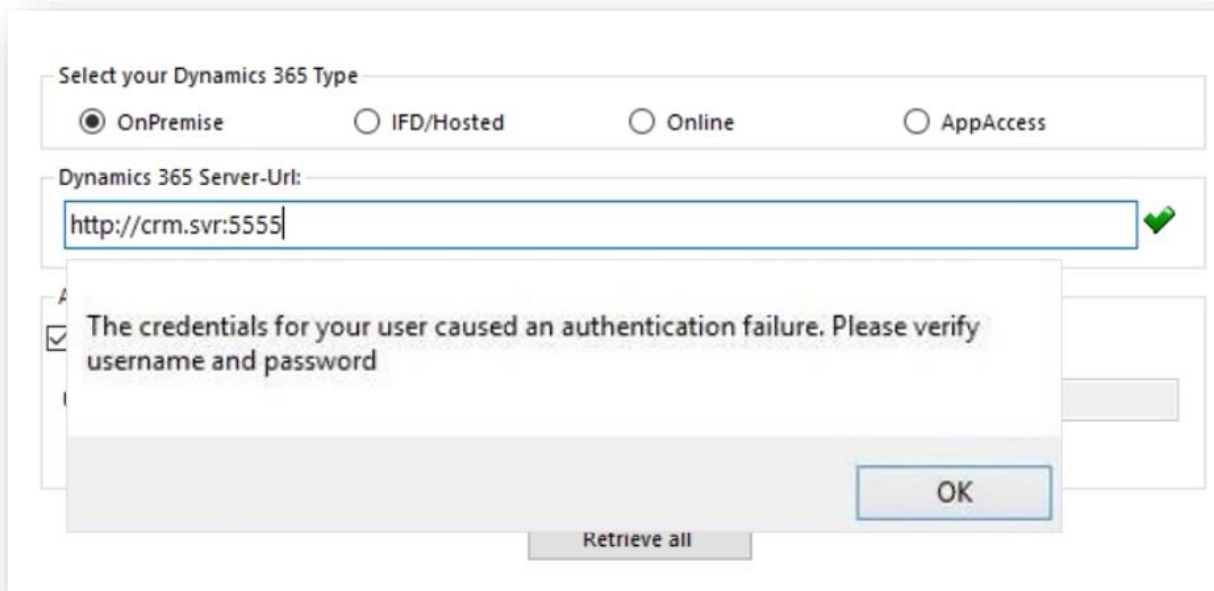


Figure 11: Logon error #2

2.5. Managing profiles

If you have more than one Dynamics 365 profile, they are listed in **1 Existing Profiles**. You can switch between your profiles. With the **2 Manage** button you can **Export**, **Delete** or **Apply** a profile.

Please note: The average Dynamics 365 user has most likely only one profile. In Figure 11, we have used some random profiles for illustration purposes.

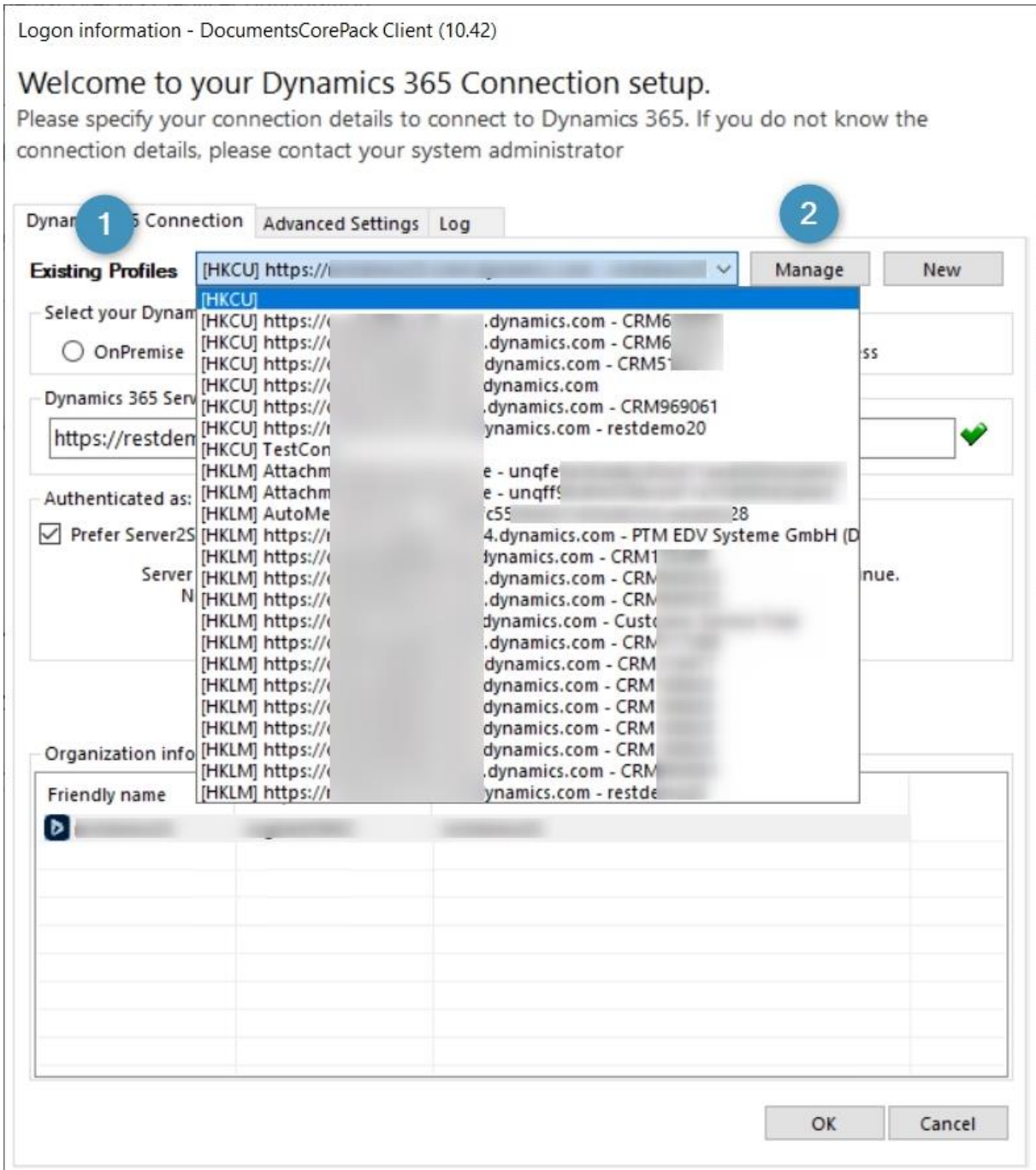


Figure 12: Existing profiles drop-down

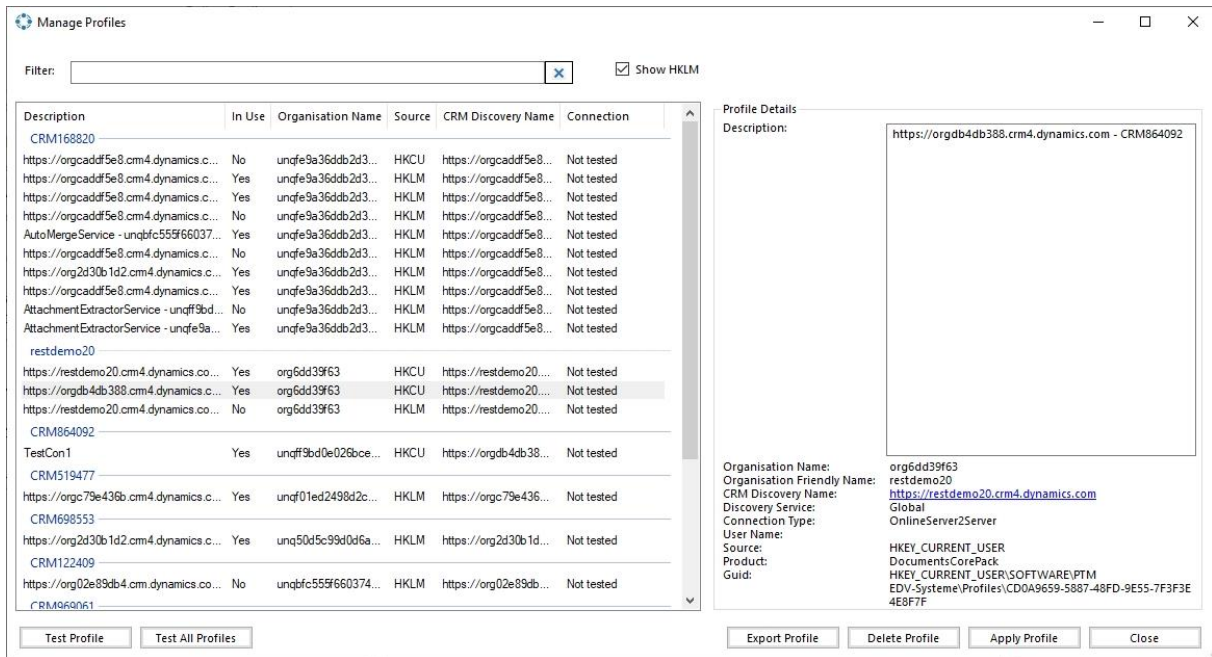


Figure 13: Managing Profiles

3. The Advanced Settings Tab

When it comes to establishing a connection, advanced settings offer additional configuration options that can help optimize the performance, security, and stability of the connection. These settings are designed for users who have a more advanced understanding of the connection requirements and are comfortable making changes to the default settings.

With advanced settings, you can fine-tune the connection to suit your specific needs, such as Dynamics 365 online options, or configuring proxy settings.

Please note: It's important to use these settings with caution and only make changes if you are confident in what you are doing, as incorrect configuration can result in connection issues or security vulnerabilities.

1 Dynamics 365 online options

- **Logon with Server-to-Server authentication:** Enable this option, if you still use a Live ID to log on to Dynamics 365 Online.
- **Logon with Microsoft XrmTooling:** Try to connect to Dynamics 365 using a Microsoft Tooling connection string.

2 Specify your proxy settings: Per default, the settings of the system are used.

- **Enable explicit Proxy:** Check this checkbox only if you want to explicitly use the specified proxy for the Dynamics 365 connection.
- **Use WPAC script:** The connection tries to load the WPAC script from the given URL when accessing Dynamics 365.
- **Disable all Proxies:** Check this checkbox to disable all proxies for the Dynamics 365 connection.

3 Advanced

- **Use HomeRealm Discovery:** If you check this box, make sure that you enter the server with the port in the general tab!
- **Override Organization URL:** Check this checkbox if you use load-balanced environments. This will ensure that the connection dialog uses the Dynamics 365 URL specified on the general tab. Instead of using the URL returned by the disco service. Ensure you are using the actual node name instead of the load balancer URL on the general tab.



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Welcome to your Dynamics 365 Connection setup.

Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection **Advanced Settings** Log

1 Dynamics 365 online options

Logon with Server to Server authentication Logon with Microsoft XrmTooling

Use local Discovery

2 Specify your proxy settings :

Proxy-Url: (Windows internet settings do not have a Proxy)

Enable explicit Proxy Use WPAC script Disable all Proxies

Authenticated to Proxy as:

Use default Credential **Not enough information to connect**

Username

Domain

Password

3 Advanced

use HomeRealm Discovery Override Organization URL

HomeRealm Server

Figure 14: Advanced Settings Tab

4. The Log Tab

Log files contain information about events and actions that occur within the connection. These files are created and maintained by the system or application itself. They provide a detailed activity, which can be useful for troubleshooting issues, diagnosing errors, and monitoring performance. This Log files can also help with security auditing, by recording events such as login attempts, failed authentication, and other types of activity that might indicate a security breach.

If you find an error that you cannot solve by yourself, please copy the content of the log tab and mail it to our [support team](#).

Logon information - DocumentsCorePack Client (10.42)

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection Advanced Settings Log

```

[11:53:27] [Ping] Execute Ping finished
[11:53:27] FINISH Ping; MemberRuntime in Seconds : 0,2343729
[11:53:27] Ping succeeded
[11:53:27] [pingWebServices] COMTOMSCRM pingWebService finished
[11:53:27] FINISH CrmUser; MemberRuntime in Seconds : 0
[11:53:27] [CrmUser] Check for cache, returned cached user 9
[11:53:27] [CrmUser] Check for cache
[11:53:27]
[11:53:27] FINISH CrmCommunicator; MemberRuntime in Seconds : 0,0156141
[11:53:27] finished with PTM.CrmDataProvider.WebService.CrmService2011
[11:53:27] start
[11:53:27]
[11:53:27] FINISH Execute; MemberRuntime in Seconds : 0,2187588
[11:53:27]
[11:53:27] FINISH CrmCommunicator; MemberRuntime in Seconds : 0
[11:53:27] finished with PTM.CrmDataProvider.WebService.CrmService2011
[11:53:27] start
[11:53:27]
[11:53:27] [pingWebServices] COMTOMSCRM pingWebService Start
[11:53:27]
[11:53:27] [Ping] Execute Ping
[11:51:27] [Ping] Execute Ping finished
[11:51:27] FINISH Ping; MemberRuntime in Seconds : 0,2343858
[11:51:27] Ping succeeded
[11:51:27] [pingWebServices] COMTOMSCRM pingWebService finished
[11:51:27] FINISH CrmUser; MemberRuntime in Seconds : 0
[11:51:27] [CrmUser] Check for cache, returned cached user 9
[11:51:27] [CrmUser] Check for cache
[11:51:27]
[11:51:27] FINISH CrmCommunicator; MemberRuntime in Seconds : 0
[11:51:27] finished with PTM.CrmDataProvider.WebService.CrmService2011
[11:51:27] start
[11:51:27]
[11:51:27] FINISH Execute; MemberRuntime in Seconds : 0,2187705
[11:51:27]
[11:51:27] FINISH CrmCommunicator; MemberRuntime in Seconds : 0
[11:51:27] finished with PTM.CrmDataProvider.WebService.CrmService2011
[11:51:27] start
[11:51:27]
[11:51:27] [pingWebServices] COMTOMSCRM pingWebService Start
[11:51:27]
[11:51:27] [Ping] Execute Ping

```

Figure 15: The Log Tab

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6. Contact

For further technical questions, please visit our [blog](#) or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



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