Sitecore Connect for Microsoft Dynamics 2.0 Installation Guide

Sitecore Experience Platform 9.0

How to install and configure Sitecore Connect for Microsoft Dynamics

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Chapter 1

Installation

This section covers how to install Sitecore Connect for Microsoft Dynamics.

1.1 Prerequisites

Before you install Sitecore Connect for Microsoft Dynamics, you must have the following:

Sitecore Experience Platform

This product requires Sitecore Experience Platform 9.0 (or greater).

Microsoft Dynamics

This product requires access to a Microsoft Dynamics instance. Both Microsoft Dynamics 365 and on-premise versions of Microsoft Dynamics are supported.

A user account on Microsoft Dynamics is also required. At a minimum, this account must have rights to read data from Microsoft Dynamics. In order for this product to write data to Microsoft Dynamics, the account must also have rights to write data to Microsoft Dynamics.

Note
This product uses the Microsoft XRM tooling to connect to Microsoft Dynamics. A connection string that is compatible with this tooling is required. Your Microsoft Dynamics administrator can provide the proper connection string to you.

More information about connection strings for Microsoft Dynamics is available at
https://msdn.microsoft.com/en-us/library/mt608573.aspx.

Network Connectivity

This product must be installed on a Sitecore server that has network connectivity to your Microsoft Dynamics instance. This may require firewall configuration, based on your network setup.

1.2 Sitecore Installation Packages

This product consists of a number of Sitecore installation packages.

Note
While the installation process may more complicated than necessary - why wouldn't Sitecore provide a single package? - there is a good reason for providing separate packages. This allows us to update individual components more easily.

1. Download the following installation packages:

    a. Data Exchange Framework 2.0.0

    b. SQL Provider for Data Exchange Framework 2.0.0

    c. Sitecore Provider for Data Exchange Framework 2.0.0

    d. xConnect Provider for Data Exchange Framework 2.0.0

    e. Microsoft Dynamics 365 for Sales Provider for Data Exchange Framework 2.0.0

    f. Sitecore Connect for Microsoft Dynamics 365 for Sales 2.0.0

2. Install Data Exchange Framework 2.0.0.

3. Install SQL Provider for Data Exchange Framework 2.0.0.

4. Install Sitecore Provider for Data Exchange Framework 2.0.0.

5. Install xConnect Provider for Data Exchange Framework 2.0.0.

6. Install Microsoft Dynamics 365 for Sales Provider for Data Exchange Framework 2.0.0.

7. Install Sitecore Connect for Microsoft Dynamics 365 for Sales 2.0.0.

1.3 Modify web.config

This product uses the Microsoft XRM tooling in order to connect to Microsoft Dynamics. This tooling requires an addition to the Sitecore server's web.config file.

1. On your Sitecore server find the web.config file.

2. In web.config, find the section configuration > runtime > assemblyBinding

3. Add the following to this section:

```
<dependentAssembly>
   <assemblyIdentity name="Microsoft.Xrm.Sdk" publicKeyToken="31bf3856ad364e35"
culture="neutral" />
   <bindingRedirect oldVersion="0.0.0.0-8.0.0.0" newVersion="8.0.0.0" />
</dependentAssembly>
<dependentAssembly>
   <assemblyIdentity name="Microsoft.Crm.Sdk.Proxy" publicKeyToken="31bf3856ad364e35"
culture="neutral" />
   <bindingRedirect oldVersion="0.0.0.0-8.0.0.0" newVersion="8.0.0.0" />
</dependentAssembly>
```

4. Save web.config.

1.4   Deploy xConnect Collection Model

This product adds a new facets to associate information from Microsoft Dynamics with Sitecore contacts and interactions. A collection model that defines these new facets must be deployed to xConnect.
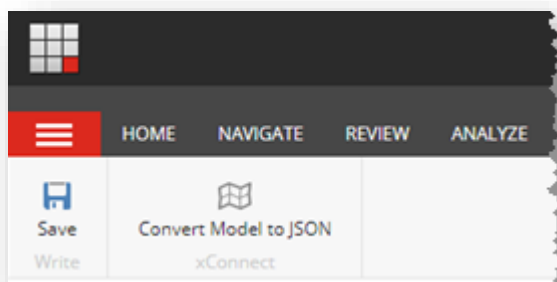
Note
For more information on how to deploy a custom collection model to xConnect, see the xConnect developer documentation.

1.   In Sitecore, open Content Editor.

2.   Navigate to *sitecore > system > Settings > Data Exchange > Providers > xConnect > Collection Models > Connect for Dynamics > Connect for Dynamics Collection Model*
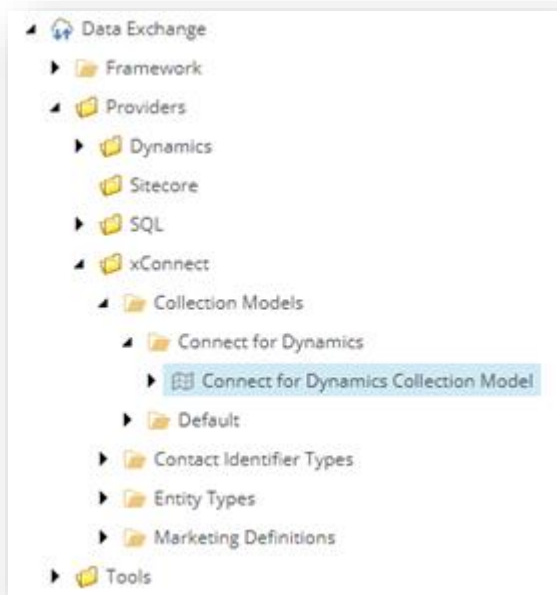
3.   In the ribbon, click *Convert Model to JSON*

4.   Your browser will download a JSON file. Save this file to your local machine.

5.   Deploy the JSON file to your xConnect server.

6.   Deploy the JSON file to your xConnect indexing server.

Chapter 2

Configuration

This section covers basic configuration options for Sitecore Connect for Microsoft Dynamics.

2.1   Add Connection String for Microsoft Dynamics

This product connects to a Microsoft Dynamics instance using a connection string.

You must add the connection string to the *ConnectionStrings.config* file on your Sitecore server.

Note
This product uses the Microsoft XRM tooling to connect to Microsoft Dynamics. A connection string that is compatible with this tooling is required. Your Microsoft Dynamics administrator can provide the proper connection string to you.

More information about connection strings for Microsoft Dynamics is available at
https://msdn.microsoft.com/en-us/library/mt608573.aspx.

The following is an example of a connection string for a Microsoft Dynamics 365 instance:

```
<add name="mycrm"
connectionString="url=https://####.api.crm.dynamics.com/XRMServices/2011/Organization.svc;
user id=####@####.onmicrosoft.com;password=####;organization=####;authentication type=2" />
```

2.2 Create Tenant

A tenant is the basic unit of configuration in this product. All of the settings that determine how data between Microsoft Dynamics and Sitecore is synchronized are contained in the tenant.

Note
Usually, a tenant represents a specific Microsoft Dynamics instance. You may configure multiple tenants if you have multiple Microsoft Dynamics instances you want to connect. It is also possible to configure a single tenant to connect to multiple Microsoft Dynamics instances. However, that configuration is not covered in this guide.

1. In Sitecore, open Content Editor.

2. Navigate to *sitecore > system > Data Exchange*
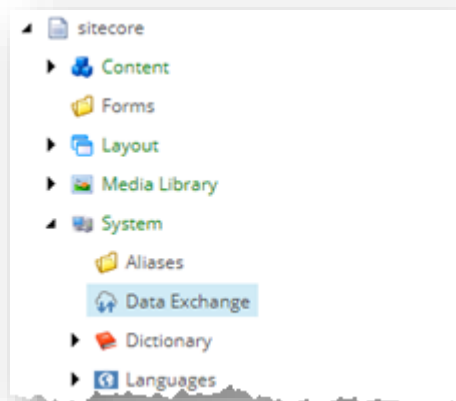
3. Add a new item using the option *Connect for Dynamics Tenant*
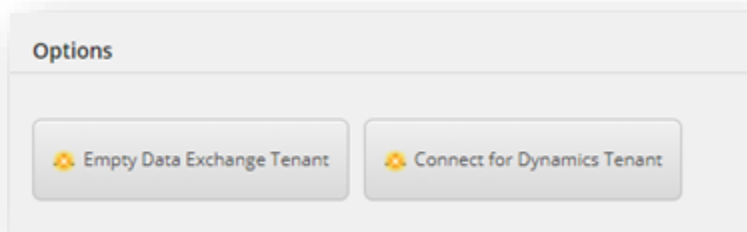
4. Enter a name for the tenant and click *OK*
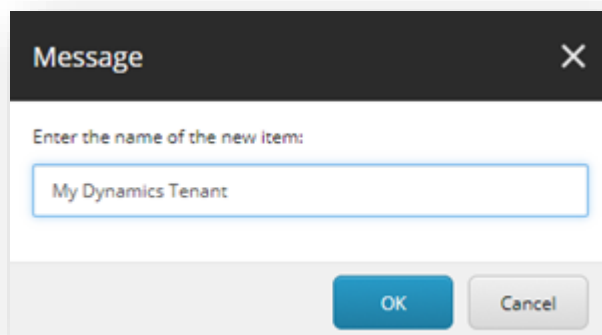
5. Creating the tenant will take some time. As it is created, a progress box appears.
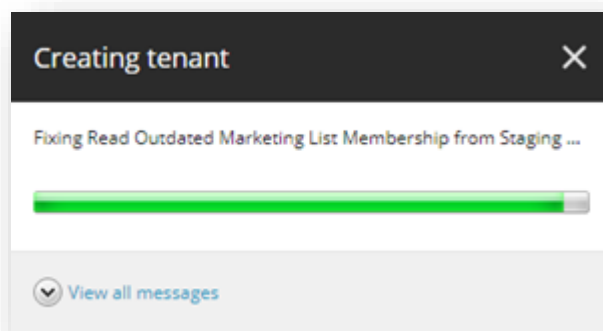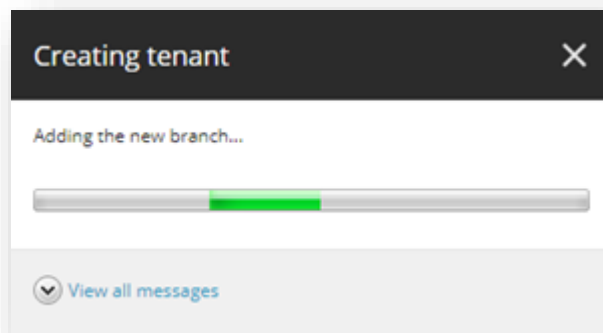
6. After the tenant is created it will appear under *sitecore > System > Data Exchange*
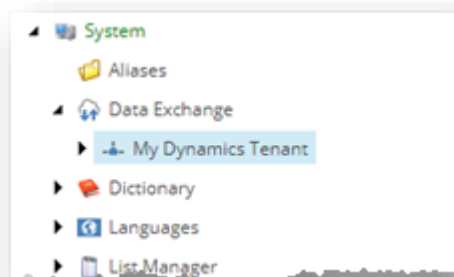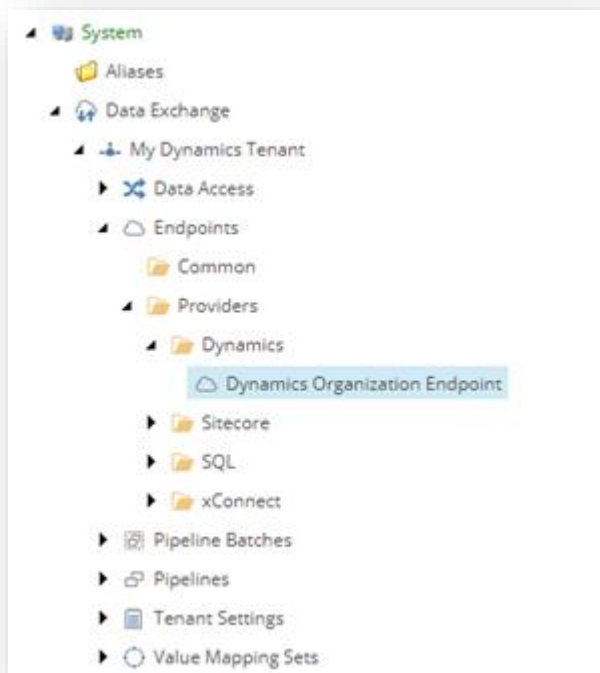
2.3 Configure Endpoints

Endpoints are used to identify the source of data that is read and the target of data that is written. Sitecore Connect for Microsoft Dynamics uses endpoints to represent Sitecore and a Microsoft Dynamics instance.
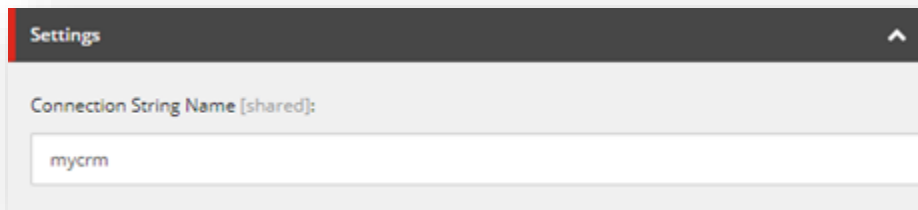
1. In Content Editor, select your tenant.
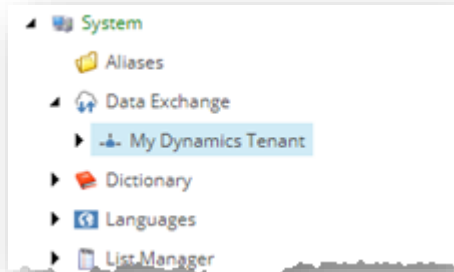
2. Navigate to *Endpoints > Providers > Dynamics > Dynamics Organization Endpoint*

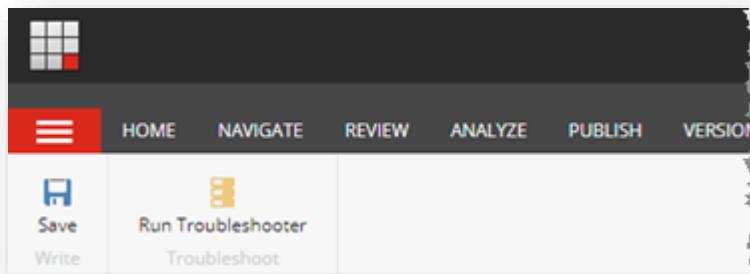3. In the field *Connection String Name*, enter the name of the connection string you added in section 2.1.
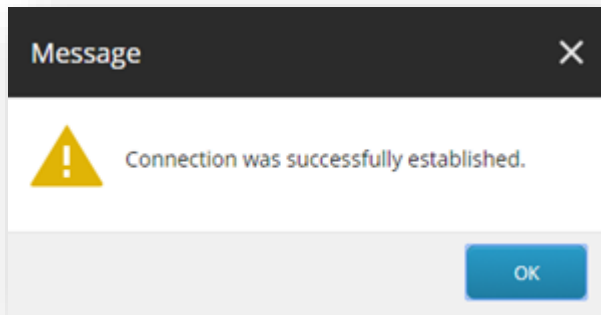
Note
If you enter a connection string that is not defined on your Sitecore server, a validation error will be displayed.
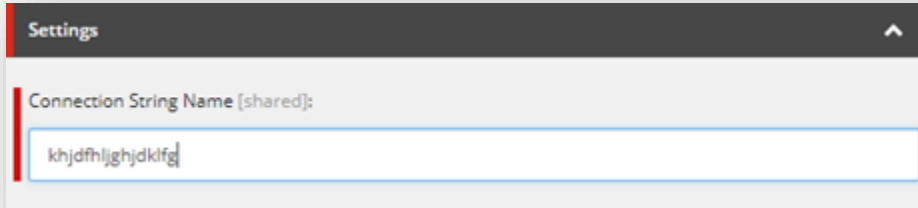
4. Save the item.
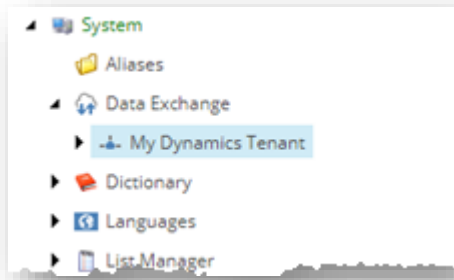
5. In the ribbon, click *Run Troubleshooter*

6. A message will appear to indicate if a connection could be established to your Dynamics instance. Click *OK*
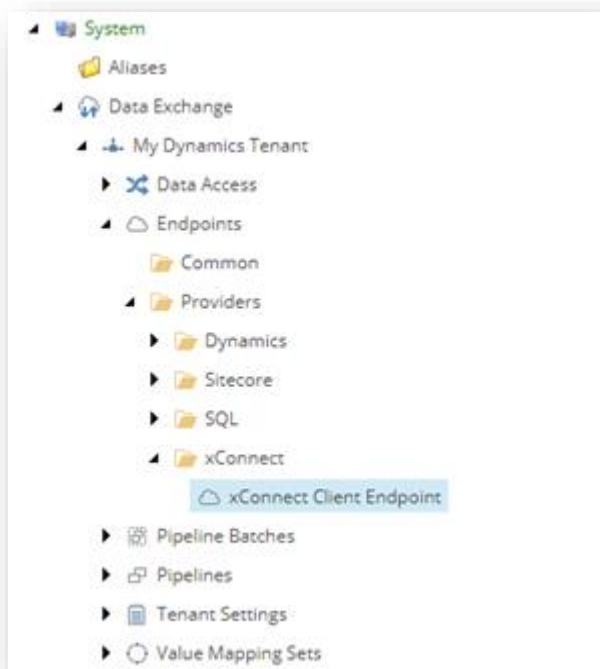

7. Select your tenant.

8.   Navigate to *Endpoints > Providers > xConnect > xConnect Client Endpoint*

9.   In the Collection Service section, enter values for the following fields:

Note
All of these values are connection string names from the ConnectionStrings.config file on your Sitecore server:

| Field name	When required	Description
Collection Service Connection String Name	Always required.	Connection string that identifies the xConnect collection service. By default the value is *xconnect.collection*.

| Collection Service Certificate Connection String Name | Required if SSL is enabled on the xConnect server. | Connection string that identifies the certificate to use when establishing a secure connection to the xConnect server.

By default the value is *xconnect.collection.certificate*. |
|---|---|---|
| Collection Service Credentials Connection String Name | Required if authentication is enabled on the xConnect server. | Connection string that specifies the credentials to use to connect to an xConnect server with authentication enabled.

Authentication is not enabled on the xConnect server by default.

For more information on supported formats for this connection string, see the Data Exchange Framework developer documentation. |
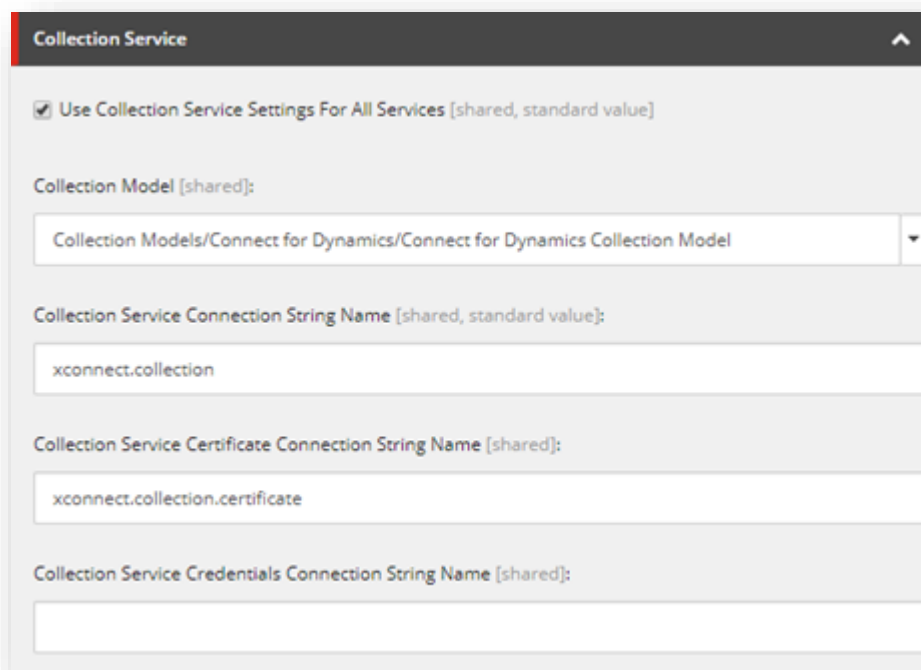
10. Save the item.

11. In the ribbon, click *Run Troubleshooter*
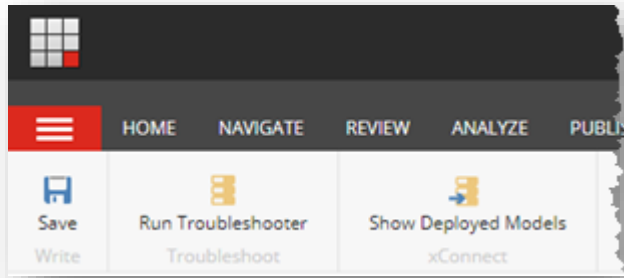
12. A message will appear to indicate if a connection could be established to your xConnect server. Click *OK*
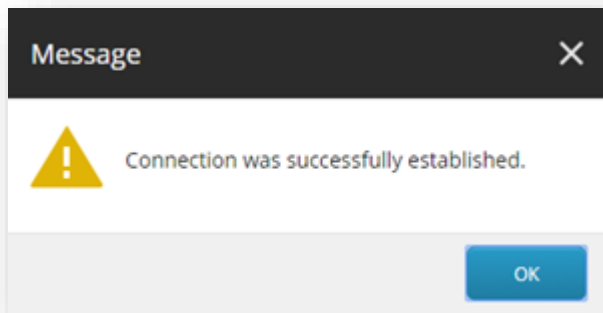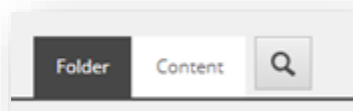
2.4 Enable Tenant

By default, the tenant is disabled. This is to ensure that no synchronization process is run until an administrator makes a conscious decision to enable the tenant.
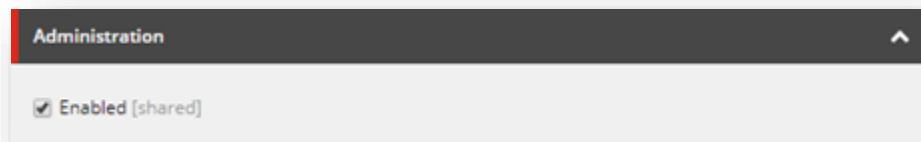
1. In Content Editor, select your tenant.
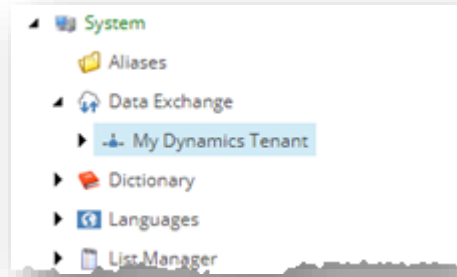
2. Navigate to the *Content* tab.

3. In the *Administration* section, tick the box *Enabled*.

4. Save the item.