Dynamics 365 (dataverse)

Available
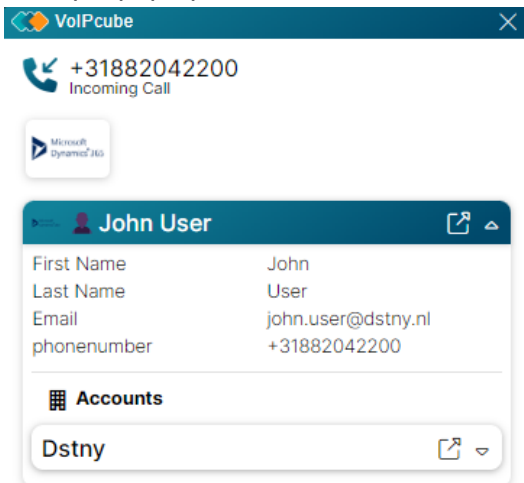
> (i) Client Integration - VoIPcube client mandatory

Introduction

This Dynamics integration works with the Microsoft Dataverse framework. This is mostly referred to as 'Dynamics CRM'. But can work with PowerApps based data as well.

The integration will search Accounts + Contacts and will show a pop-up

example pop-up:

Configuration

The Dynamics Integration works with OAuth2.0. This means users will log in with their own credentials. VoIPcube will automatically present the login screen when required.

A one-time setup in the azure environment is needed.

- Go to https://portal.azure.com

- Go to Entra ID

Welcome to Azure!

Don't have a subscription? Check out the following options.

Start with an Azure free trial
Get $200 free credit toward Azure products and services, plus 12 months of popular free services.

[Start]

Manage Azure Active Directory
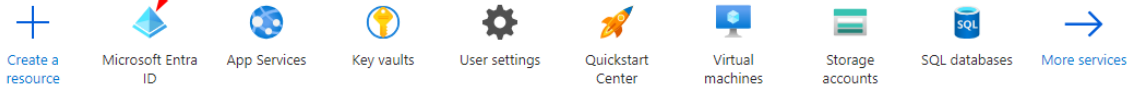Azure Active Directory is becoming Microsoft Entra ID. Secure access for everyone.
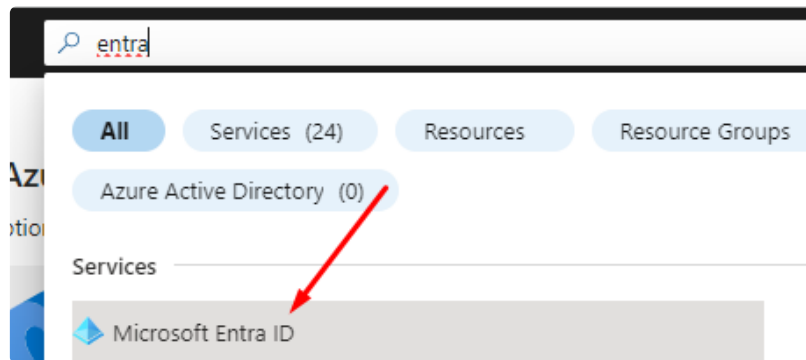
[View] Learn more ⬈

Access student benefits
Get free software, Azure credit, or access Azure Dev Tools for Teaching after you verify your academic status.

[Explore] Learn more ⬈
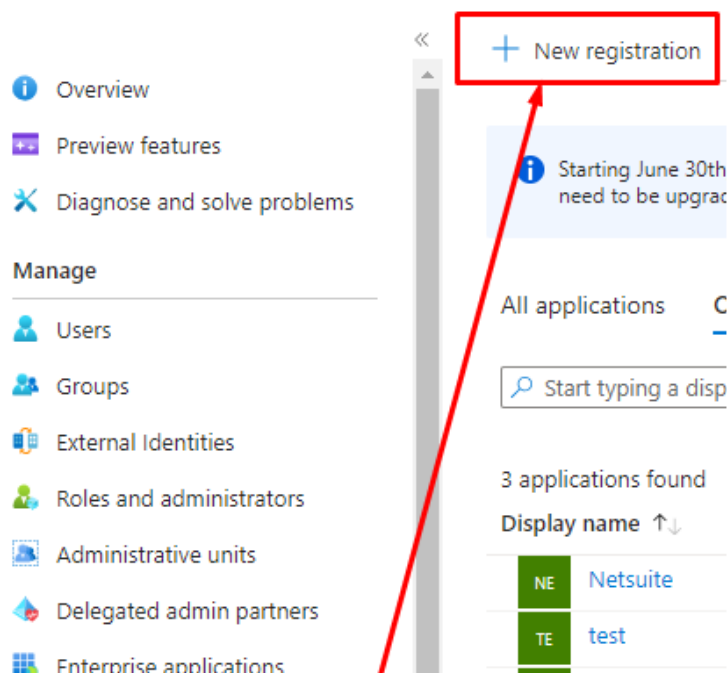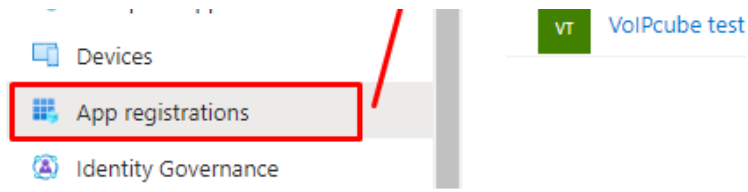
Azure services

+	◆	🌐	🔑	⚙	🚀	🖥	▬	SQL	→
Create a resource	Microsoft Entra ID	App Services	Key vaults	User settings	Quickstart Center	Virtual machines	Storage accounts	SQL databases	More services

OR

🔍 entra

| **All** | Services (24) | Resources | Resource Groups |

Azure Active Directory (0)

Services

◆ Microsoft Entra ID

- Go to `App Registrations` > `New Registration`

《

➕ New registration

ⓘ Overview
➕➕ Preview features
✖ Diagnose and solve problems

Manage

👤 Users
👥 Groups
🔷 External Identities
👤 Roles and administrators
🖼 Administrative units
🔶 Delegated admin partners
▦ Enterprise applications

ⓘ Starting June 30th need to be upgrad

All applications

🔍 Start typing a disp

3 applications found

Display name ↑↓

NE Netsuite

TE test

- Enter the following details
  - `Name` : identifiable name
  - `API Access` : Accounts in this organizational directory only (single tenant)
  - `Redirect URI` : Web | https://voipcube.nl

  - Click `Register`
- Note down the `Application (client) ID`

- Go to `Certificates & Secrets`

- Click on `New Client Secret`

- Add a `Description` and set the `Expires` and click `add`

Add a client secret   ✕

Description	VoIPcube
Expires	730 days (24 months) ⌄

- Note down the secret `Value`.

ⓘ   The value is only shown once. make sure to save it!

ⓘ Application registration certificates, secrets and federated credentials can be found in the tabs below.   ✕

Certificates (0)   **Client secrets (1)**   Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value ⓘ	Secret ID
VoIPcube	10/17/2025	JLi8Q~lvA83nJUPKBTtN9-Uf3V7X0HdmV... 🗐	dbe0a3cc-73a3-4a3d-955b-5c6d3bf5e0f3 🗐 🗑

- Click on `API permissions` > `Add a permission`

- Find `Dynamics CRM` and add `user_impersonation` and click `add permissions`

Permission		Admin consent required
∨ Permissions (1)		
☑	user_impersonation ⓘ Access Common Data Service as organization users	No

- Click `Grant admin consent for {Organization}`

> ⓘ This action allows usage of the app registration for all users in the {Organization}

- Finally, note down the Dynamics FQDN

🔒 destiny.crm4.dynamics.com/main.aspx?forceUCI=1&pagetype=apps

Assignment

- Assign the Dynamics 365 (Dataverse) Integration to the customer
  - Enter the `Client ID`
  - Enter the `Client Secret`
  - Change the `Extra parameters` to include the FQDN
  - Enter the `domain`. This is the FQDN **without** https:// prefix