

11/06/2023

Dynamics Sync Instructions // Application User Customer Success

Net-Results Sync for Dynamics 365 - Update to an Application User

Net-Results has created a new Microsoft Entra Id App Registration for use in the data syncs between your Net-Results instance and your Dynamics 365 instance.

The new Microsoft Entra Id Application uses the more secure X.509 Certificate for identity verification, a Microsoft Power Platform Application User that does not require any license (Microsoft Entra Id or Dynamics 365), and an editable Microsoft Power Platform Security Role that only grants the specific permissions in Dynamics 365 that the data syncs require to operate. The Application, Application User, and Security Role combined removes the need to add the Net-Results Application as an exclusion to your MFA Policies. The Application User also provides better auditing by separating Net-Results sync activity from any Dynamics 365 User activity.

This is the process for updating to the new Net-Results Application:

- 1) Disable the syncs in Net-Results
- Remove any application exclusions from your MFA Policies
 **only if you have previously added it to your MFA Policies
- 3) Remove the old Net-Results Application from Microsoft Entra Id (Enterprise Applications)
- 4) Grant Admin Consent for the new application (grants api access)
- 5) Import the Security Role Solution (grants api permissions)
- 6) Create the Application User and attach the Security Role
- 7) Enable the syncs in Net-Results

Disable The Syncs In Net-Results

A Net-Results User with permission to view the integration settings is required. Login to Net-Results at:

<u>https://www.net-results.com/app/login.php</u>

Navigate to the Dynamics Sync Options:

https://apps.net-results.com/app/DynamicsIntegration/options

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Uncheck the 'Syncs Enabled' checkbox and click 'Save'

| Ń | Marketing Center | Contacts & | Accounts 🔻 | Segments 🔹 | Reporting 🔹 | Create New 🔻 |
|-----------|-----------------------------|----------------------|-----------------|--------------------|-----------------|----------------------|
| Dyna | amics Sync | Options | Dynamics | s 365 Admin Cons | sent 🔅 Field Ma | ppings 🛛 🌣 Sync Erro |
| | | | | | | |
| Syncs | Enabled | | | | | |
| Full Sync | and Error Notification Rec | ipient(s): (Separate | multiple addre | sses with commas |) | |
| support | @net-results.com | | li. | | | |
| 🗸 When | syncing Contacts/Leads fr | om Dynamics, only | sync records th | at have email addr | esses | |
| 🗸 Allow | Dynamics to Write Empty F | ields to Net-Result | s | | | |
| 🗸 Allow I | Net-Results to Write Empty | / Fields to Dynamic | s | | | |
| 🗸 Sync L | ead Score Changes To Dyn | amics | | | | |
| V Sync C | Only The Lead Score On A Le | ad Score Change | | | | |
| 🗸 Do No | t Sync Inactive Items | | | | | |
| 🗸 Sync N | Marketing Lists from Micro | soft Dynamics to N | et-Results | | | |
| Default A | ccount Name | | | | | |
| UIIKIIOV | VII) | | | | | |
| Default L | ast Name | | | | | |
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| Save | Cancel F | ull Sync From Dy | namics | | | |
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Remove any Application Exclusions from your MFA Policies

A Microsoft Entra Id Administrator is required.

Login to Microsoft Entra Id at:

https://entra.microsoft.com/

In the left nav, expand 'Protection', click on 'Conditional Access', click on 'Policies'

| Microsoft Entra admin cer | nter | | ${\cal P}$ Search resources, services, and docs (G+/) |
|------------------------------------|--------|-------------------------------------|--|
| | Â | Home > Conditional Access | |
| T Home | | ₅ Conditional Acces | s Policies |
| ★ Favorites | \sim | Microsoft Entra ID | |
| | | * | \leftarrow + New policy + New policy from template $\overline{\uparrow}$ |
| Identity | ~ | 0 Overview | |
| 0 | | ≸ ≣ Policies | A Misses & Ester ID and suggested ID 61 Hadata upon |
| Overview | | Insights and reporting | Microsoft Entra ID now supports IPVo: Opdate your I |
| A Users | \sim | 🗙 Diagnose and solve problems | |
| ^A R ^A Groups | \sim | Manage | > Search policies |
| | | | Policy Name ↑↓ |
| 🔁 Devices | \sim | Named locations | MFA |
| Applications | \sim | Custom controls (Preview) | Block legacy authentication |
| A Protection | _ | 🧭 Terms of use | |
| Protection | ~ | VPN connectivity | |
| Identity Protection | | 🖧 Authentication contexts | |
| Conditional Access | | Authentication strengths | |

Click on each MFA policy that you have added the Net-Results application as an exclusion

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Click the link under 'Target Resources', it may say 'All cloud apps included and 1 app excluded', but it may be labeled differently

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Microsoft Entra admin center



| Ho | me > Conditional Access Overview > Policie |
|--------------------------|--|
| Μ | IFA ···· |
| Cor | nditional Access policy |
| Ĺ | Delete 💿 View policy information |
| Cor pol dec Lea | ntrol access based on Conditional Access licy to bring signals together, to make cisions, and enforce organizational policies. arn more |
| Nai | me * |
| N | IFA |
| Ass | signments |
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| А | ll users |
| Tar | get resources 🕕 |
| А | Il cloud apps included and 1 app excluded |
| Coi | nditions ① |
| 0 | conditions selected |
| Aco | cess controls |
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| 1 | control selected |
| Ses | ssion 🗊 |
| | controls selected |

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Click on 'Exclude', then click the 3 dots to the right of the 'Net-Results Sync for Dynamics 365' app (this may be listed as 'Net-Results Sync for Dynamics Old'), then click 'Remove'

| м | licrosoft Entra admin cente | | ✓ Search resources, services, and docs (G+/) |
|-----------------------------|-----------------------------|--|--|
| A | Home | Home > Conditional Access Pol | icies > |
| * | Favorites | Conditional Access policy | mation |
| > (i) | Identity Overview | Control access based on Conditiona policy to bring signals together, to r | Access Control access based on all or specific network access traffic, cloud apps or actions. Learn more |
| 8 | Users | Learn more Name * | Select what this policy applies to Cloud apps |
| ⁴ 2 ⁴ | Groups | MFA | Include Exclude |
| -8 | Devices | Assignments | Select the cloud apps to exempt from the |
| ₿ | Applications | V Users ① | policy |
| A | Protection | All users | Edit filtar (Draviau) |
| | Identity Protection | Target resources ① All cloud apps included and 1 app | excluded None |
| | Conditional Access | Conditions 🛈 | Select excluded cloud apps |
| | Authentication methods | 0 conditions selected | Net-Results Sync for Dynamics Old |
| | Password reset | Access controls | (Net-Results Sync for Dynamics - |
| | Custom security attributes | Grant 🕕 | |
| | Risky activities | 1 control selected | |
| ۲ | Identity governance | Session ① O controls selected | |
| Q | External Identities | \sim | |

Click on 'Save'

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| м | icrosoft Entra admin cente | r | | ${\cal P}$ Search resources, services, and docs (G+/) |
|-----|----------------------------|--------|---|--|
| \$ | Home | Â | Home > Conditional Access Policies > | |
| | | | MFA ···· | |
| * | Favorites | \sim | Conditional Access policy | |
| 4 | Identity | ~ | | |
| i | Overview | | Control access based on Conditional Access policy to bring signals together, to make decisions, and enforce organizational policies | Control access based on all or specific network access traffic, cloud apps or actions. Learn more |
| Q | lisers | \sim | Learn more | Select what this policy applies to |
| () | 05015 | | Name * | |
| °2° | Groups | \sim | MFA | Include Exclude |
| 6 | Devices | \sim | Assignments | Select the cloud apps to exempt from the |
| ₿ | Applications | \sim | Users () | policy |
| A | Protection | ~ | All users | Edit filter (Preview) |
| | Identity Protection | | Target resources () | None |
| | Conditional Access | | Conditions | Select excluded cloud apps |
| | Authentication methods | | 0 conditions selected | None |
| | Password reset | | Access controls | |
| | Custom security attributes | | Grant () | _ |
| | Risky activities | | 1 control selected | _ |
| ٤ | Identity governance | \sim | Session (i) 0 controls selected | |
| đ | External Identities | \sim | | |
| | Show more | | | |
| 4 | Protection | ~ | Enable policy | |
| 2 | Learn & support | ^ | Report-only On Off | |
| | | ~ | Save | |

After a few moments, you should see the successful save message in the upper-right

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Successfully updated MFA × Successfully updated MFA. Policy will be enabled in a few minutes if you have "Enable policy" set to "On".

Remove the old Net-Results Application from Microsoft Entra Id

A Microsoft Entra Id Administrator is required.

Login to Microsoft Entra Id at:

https://entra.microsoft.com/

In the left nav, expand 'Applications' and click on 'Enterprise applications' In the list of applications, find and click on 'Net-Results Sync for Dynamics 365' (this may be listed as 'Net-Results Sync for Dynamics Old')

| Microso | oft Entra admin center | ₽ Search re | esources, services, and docs (G· |
|----------------------------------|------------------------|--|----------------------------------|
| | _ | Home > Enterprise applications | |
| T Hom | le | Enterprise applications All | applications |
| ★ Favo | rites 🗸 🗸 | Net-Results - Microsoft Entra ID for workforce | |
| | | Overview | pplication 🕐 Refresh 🛓 |
| Iden | tity ^ | Overview View, filter, a | and search applications in your |
| (i) Over | view | X Diagnose and solve problems The list of a | pplications that are maintained |
| A Users | 5 ~ | Manage Rearch | by application name or object I |
| ^ቀ ጵ ^ል Grou | ps 🗸 🗸 | All applications 6 application | ns found |
| 🗗 Devi | ces 🗸 🗸 | Application proxy | \uparrow_{\downarrow} |
| 🗄 Appli | ications | Diser settings MB Mic | crosoft Business Solutions |
| Ento | price applications | App launchers RO Rur | n One UI Application |
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| App | registrations | PO Pos | stman |
| A Prote | ection 🗸 | SS SSC | 2 |
| 🕄 Ident | ity governance 🗸 🗸 | Consent and permissions | t-Results Sync for Dynamics |

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In the application nav, click 'Properties', then click 'Delete', then click 'Yes'

| | | | - | | | |
|-----|------------------------------|--------|--|---|--------------------------------------|---|
| N | licrosoft Entra admin center | r | | $\mathcal P$ Search resources, services, and doc | s (G+/) | |
| A | Home | Î | Home > Enterprise applications All | applications > Net-Results Sync for Dyna for Dynamics Old Prop | mics Old erties … | |
| * | Favorites | \sim | Enterprise Application | « 🖫 Save 🗙 Discard 💼 Delete | 🖗 Got feedback? | |
| 4 | Identity | ^ | Overview Deployment Plan | Delete Net-Results Sync for Dynami | cs Old? | |
| i | Overview | | X Diagnose and solve problems | Ves No | | |
| 8 | Users | \sim | Manage | | | |
| ^%* | Groups | \sim | Properties | Enabled for users to sign-in? ① | Yes No | |
| £ | Devices | \sim | A Owners | Name * 🛈 | Net-Results Sync for Dynamics Old | ~ |
| ₩8 | Applications | ~ | & Roles and administrators | Homepage URL ① | https://www.net-results.com/ | D |
| | Enterprise applications | | Users and groups Single sign-on | Logo 🛈 | Ń | |
| | App registrations | | Provisioning | | | |
| ä | Protection | \sim | Application proxy | | Select a file | |
| 3 | Identity governance | \sim | Self-service Oustom security attributes | Application ID ③ | 28e1f0fa-7e2e-4a84-a9dc-fd7a70f5fee7 | D |
| ų | External Identities | \sim | Constant Security attributes | Object ID 🕕 | f279d0ea-4e0c-461b-b24c-e8264c09f629 | D |
| | Show more | | Conditional Access | Assignment required? | Yes No | |
| | Drotoction | | 🖧 Permissions | Visible to users? ① | Yes No | |

After a few moments, you should see the successful delete message in the upper-right



You may need to click on 'Refresh' before the app disappears from the list

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Grant Admin Consent For The New Application

A Net-Results User with permission to view the integration settings is required.

A Microsoft Entra Id Administrator is required.

This adds the new application to Microsoft Entra Id Enterprise Applications

Login to Net-Results at:

https://www.net-results.com/app/login.php

Navigate to the Dynamics 365 Admin Consent:

https://apps.net-results.com/app/DynamicsIntegration/adminConsent

Your Dynamics 365 URL should already be populated

Click on 'Begin Consent'

(This will redirect the browser to the Microsoft Login page)

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Login with a Microsoft Entra Id Administrator

| Sign in Email or phone Can't access your account? | |
|---|------|
| Can't access your account? | |
| | |
| | |
| | Next |

Click on 'Accept' for the permissions request (This will redirect the browser to the Consent Response page in Net-Results)

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| Microsoft | | | | | | |
|--|--|--|--|--|--|--|
| @net-results.com | | | | | | |
| Permissions requested Review for your organization | | | | | | |
| Net-Results Sync for Dynamics 365 Forward I.T. Solutions, LLC | | | | | | |
| This app would like to: | | | | | | |
| ✓ Access Common Data Service as organization users | | | | | | |
| ✓ Sign in and read user profile | | | | | | |
| If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions. | | | | | | |
| Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. You can change these permissions at https://myapps.microsoft.com. Show details | | | | | | |
| Does this app look suspicious? Report it here | | | | | | |
| Cancel Accept | | | | | | |
| | | | | | | |

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Narketing Center • Contacts & Accounts • Segments • Reporting • Create New

Dynamics 365 Consent Response Opnamics 365 Admin Consent Opried M

Net-Results Sync for Dynamics 365 application Admin Consent granted!

Please follow the next steps for adding the Application User and Security Role.

If you have any questions, please contact support.

This only grants the new 'Net-Results Sync for Dynamics 365' application the ability to access the Dynamics 365 Web API in your organization. The specific permissions of what the application is allowed to access in your organization are covered in the Security Role and Application User sections below. This shows the Application Registration API Permissions label as Dynamics CRM. You can see 'Access Common Data Service as organization user' matches the description for 'user_impersonation' (This will be the Application User). 'Sign in and read user profile' is that you are always allowed to read the profile of the user you are logged in as (This will be the Application User). It is unknown why these do not match exactly and the Accept dialogue is ambiguous about it being only for Dynamics 365 Web API access.

Home > App registrations > Net-Results Sync for Dynamics 365

- Net-Results Sync for Dynamics 365 | API permissions 🖉 …

| 2 | Search | « | 🖒 Refresh 🖗 Got | feedback? | | | | |
|-----------|-------------------------------------|---|---|-----------|--|--|--|--|
| | Overview | | | | | | | |
| #44 ** | Quickstart Integration assistant | | The "Admin consent required" column shows the default value for an organization. However, user consen where this app will be used. <u>Learn more</u> | | | | | |
| Ma | inage | | Configured permission | IS | | | | |
| nivia | Branding & properties | | Applications are authorized to call APIs when they are granted permissions by users/admins as part of | | | | | |
| Э | Authentication | | all the permissions the application needs. Learn more about permissions and consent | | | | | |
| • | Certificates & secrets | | + Add a permission 🗸 Grant admin consent for Net-Results | | | | | |
| Ш | Token configuration | | API / Permissions name | Туре | Description | | | |
| -9- | API permissions | | ✓ Dynamics CRM (1) | | | | | |
| 2 | Expose an API | | user_impersonation | Delegated | Access Common Data Service as organization users | | | |
| 8 | App roles | | | |) | | | |

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The new app will now be listed in Microsoft Entra Id Enterprise Applications



Import The Security Role Solution

A Microsoft Power Automate Administrator is required.

A Microsoft Power Platform Administrator is required.

Download the 'Net-Results Sync for Dynamics 365' Solution from:

https://assets.net-results.com/assets/CRM_Install_Packages/Dynamics/NetResultsSyncfor Dynamics365-v1.0.1.365.zip

Login to Microsoft Power Automate at:

https://make.powerautomate.com/

In the upper-right, switch to the Environment you want to import the Security Role into

| ::: Power Automate | ∠ Search | Environments Net-Results | @ ? (|
|--------------------|----------|-----------------------------|-------|
| = | | | |
| home | | | |

In the left nav, click on 'Solutions', then click on 'Import solution', then click on 'Browse'

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Browse to the location you downloaded the solution file to, double-click it to select it, then click 'Next'

| === | Power Automate | | ₽ Searce | ch | | | | A Strain |
|---|-----------------------|--|----------|---------------------|-----------------------------------|----------------|-------|---|
| = | | + New solution 🕂 Import solution 📋 Open AppSo | - //// | Import a solution | | | | |
| ŵ | Home | Solutions | | | | | | Emailmentment Net-Results |
| + | Create | Solutions Publishers History | | | | | | Select a file |
| cS | Templates | | | | | | | Browse for the solution file to import. |
| | Learn | Display name \sim | | Name \sim | Created \downarrow \checkmark | Version \sim | Manag | Browse NetResultsSyncforDynamics365-v1.0.1.365.zip |
| 00 | My flows | Funnel Vision Marketing Automation | | Furnel/sionMarketi | 2 weeks ago | 2.0.3.365 | Yes | |
| G | Approvals | LinkedIn Sales Navigator for Dynamics 365 | | msdyn_LinkedInSale | 11 months ago | 3.0.1.1330 | Ves | |
| ≥ | Solutions | Contextual Help | | msdyn_ContextualH | 2 years ago | 1.0.0.22 | Ves | 1 |
| Cas | Process mining | Power Apps Checker | | msdyn_PowerAppsC | 3 years ago | 2.0.0.8 | Ves | |
| C . | Al models | Contextual Help Base | | rrsdyn_ContextualH | 3 years ago | 1.0.0.22 | Ves | |
| ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | Desktop flow activity | Power Apps Checker Base | | msdyn_PowerAppsC | 4 years ago | 2.0.0.8 | Ves | Try pipelines for effortless in |
| | More | Sales Navigator for Dynamics 365 Unified Inter | | LinkedInSalesNaviga | 4 years ago | 3.0.1.1330 | Ves | Use pipelines to simplify and automate the dep |
| P | Power Platform | Linkedin - Sales Navigator | | LinkedIn | 4 years ago | 3.0.1.0440 | Yes | your organization. Pipelines is a feature of Mana Learn more |
| | | CDS Default Publisher | | Cr659d9 | 5 years ago | 1.0.0.0 | No | |
| | | Default Solution | | Default | 10 years ago | 1.0 | No | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Ask a chatbot | | | | | | | Next |

The file will upload for a few moments. When it is finished, click on 'Import'

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| | Power Automate | م | Searc | ch | | | | | |
|---------------|------------------------------------|---|-------|---------------------------------------|----------------------------|----------------|------------|---|--|
| ≡ 3 | Home | + New solution ← Import solution ① Open AppSource | 🗖 Pu | ublish all customizations | | | | Import a solution | |
| + 23 | Create Templates | Solutions Publishers History | | | | | | Details Name | |
| | Learn My flows | Display name 🗸 | | Name V | Created $\downarrow \lor$ | Version ~ | Manag | Type Managed | |
| 6 | Approvals | LinkedIn Sales Navigator for Dynamics 365 | | msdyn_LinkedInSale | 11 months ago | 3.0.1.1330 | Yes | Publisher Net-Results, LLC. | |
| 2 3 | Solutions Process mining | Contextual Help Power Apps Checker | | msdyn_ContextualH msdyn_PowerAppsC | 2 years ago 3 years ago | 2.0.0.8 | Yes Yes | Description This solution adds the 'Net-Results application user. | |
| 0 | Al models Desktop flow activity | Contextual Help Base | - | msdyn_ContextualH | 3 years ago | 1.0.0.22 | Yes | Version 1.0.1.365 | |
| | More | Power Apps Checker Base Sales Navigator for Dynamics 365 Unified Inter | | msdyn_PowerAppsC | 4 years ago 4 years ago | 3.0.1.1330 Yes | Yes | No | |
| ₽ | Power Platform | LinkedIn - Sales Navigator CDS Default Publisher | | LinkedIn Cr659d9 | 4 years ago 5 years ago | 3.0.1.0440 | Yes No | Advanced settings 🗸 | |
| | | Default Solution | | Default | 10 years ago | 1.0 | No | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Ę. | Ask a chatbot | | | | | | | Import Cancel | |

While the solution is being run through the Solutions Checker and Imported, you will see 'Currently importing solution "Net-Results Sync for Dynamics 365".' at the top of the screen.

| | Power Automate | |
|----------|----------------|--|
| \equiv | | + New solution ← Import solution 📋 Open AppSource |
| Ŵ | Home | () Currently importing solution "Net-Results Sync for Dynamics 365". |

When it is finished you will see 'Solution "Net-Results Sync for Dynamics 365" imported successfully.' and it will be in the list.

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You should now be able to see the 'Net-Results Sync for Dynamics 365' Security Role in the Power Platform

Login to Microsoft Power Platform at:

https://admin.powerplatform.microsoft.com/

Click on 'Environments', then click on the environment you installed the solution into.

| | Power Platfor | m adm | nin center | | | | | | |
|-----|-------------------|--------|------------|---------------|--------|--------------|--------|------------|------------|
| = | | | + New Č |) Refresh | 🗟 Rece | ntly deleted | enviro | nments | 🕲 Environr |
| ώ | Home | | Environme | ents | | | | | |
| ≞ | Environments | | | | | | | | |
| Ŀ | Analytics | \sim | Env | vironment | | | | Туре | |
| ÷0 | Billing (Preview) | \sim | Net | -Results Dev | | | - : | Sandbox | |
| ()) | Settings | | Net | -Results (def | ault) | | | Default | |
| ÷0 | Resources | \sim | Net | -Results | | | | Production | |
| | | | | | | | | | |

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Click on 'See all' under 'Security roles'

| ···· Power Platform adm | III Power Platform admin center | | | | | | | |
|---|---|--------------|----------------|--|--|--|--|--|
| = | 🗅 Open 🗔 Resources 🗸 🛞 Settings 🚏 Convert to sandbox 🕤 Backup & Restore 🗸 🎦 Copy 📋 Delete 🕚 History | | | | | | | |
| ⇔ Home | Environments > Net-Results | | | | | | | |
| A Environments | | | | | | | | |
| 🔄 Analytics 🛛 🗸 | Details | See all Edit | Access | | | | | |
| $\overline{\rm Ls}$ Billing (Preview) $~~ \sim$ | Environment URL State Region | | Security roles | | | | | |
| Settings | net-results.crm.dynamics.com Ready United States | | See all | | | | | |

Scroll down to find and click on 'Net-Results Sync for Dynamics 365'

| | Power Platform adı | nin center |
|----|--------------------------|---|
| ≡ | | 🗈 Copy 🖉 Edit 前 Delete 🛠 Members 🗟 Audit report |
| ώ | Home | Environments > Net-Results > Settings > Security roles |
| ₽ | Environments | Manage security roles within this environment so that people can access the |
| Ŀ | Analytics \checkmark | Display only parent security roles On |
| ×, | Billing (Preview) \sim | |
| ŝ | Settings | Role ↑ Busine |
| ₹ø | Resources \lor | Net-Results Sync for Dynamics 365 ···· |

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| ···· Power Platform as | dmin | center | | | | | | | | | | • ? () |
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| | | Environments > Net-Results | mirronments > Net-Results > Settings > Security roles > Net-Results Sync for Dynamics 365 | | | | | | | table privilege n | | |
| A Environments | | ○ Details | | | | | | | | | | |
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| 😼 Billing (Preview) 🗸 🗸 | 1 | When role is assigned to a Team | vanima sum. | | | | | | | | | |
| Settings | | Team member gets all team privileges by Team members can inherit team privileg | ry default. Jes directly based or | access level. Learn More | | | | | | | | |
| Resources 🗸 | | Member's privilege inheritance | | | | | | | | | | |
| P Help + support | | Direct User (Basic) access level and Tea | am priv 🗸 | | | | | | | | | |
| B Data integration | | Tables Miscellaneous privileges | Privacy-relate | ed privileges | | | | | | | | |
| G Data (preview) | | Chaus and accional tables | 1 | | | | | | | | Compact Grid V | iew 💽 On |
| Do Policies 🗸 🗸 | | anim only assigned takes | | | | | | | | | | |
| Admin centers ~ | | \checkmark Table \uparrow | | Name | Record ownership | Permission Setti | Create | Read | Write | Delete | Append | Append to |
| | | Business Management (| (2) | | | | | | | | | I |
| | | Currency | | transactioncurrency | Organization | Reference | ⊗ None | 🖧 Organization | ⊗ None | ⊗ None | 🚫 None | 🚫 None |
| | | User | | systemuser | Business Unit | Reference | ⊗ None | A Organization | ⊗ None | ⊗ None | ⊗ None | 🛇 None |
| | | Core Records (5) | | | | | | | | | | |
| | | Account | | account | User or Team | Custom | A Organization | A Organization | A Organization | None None | 🖧 Organization | A Organization |
| | | Activity | | activitypointer | User or Team | Custom | A Organization | 🔥 Organization | 🔥 Organization | None None | 🖧 Organization | & Organization |
| | | Contact | | contact | User or Team | Custom | A Organization | A Organization | A Organization | ⊗ None | A Organization | A Organization |
| | | Lead | | lead | User or Team | Custom | A Organization | 🔥 Organization | 🔥 Organization | ⊗ None | 🖧 Organization | A Organization |
| | | Opportunity | | opportunity | User or Team | Reference | ⊗ None | A Organization | ⊗ None | ⊗ None | None None | None . |

The permissions are set to 'Organization'. Most will leave this default setting. You can change these to 'Parent: Child Business Unit' or 'Business Unit' where applicable to suit your needs. The permission for reading the Audit table (for tracking entity deletions) is under 'Miscellaneous privileges'

| | Power Platfor | m adm | in center | | |
|----|--------------------|--------|--|---|-----------------|
| = | 1 | | 🗅 Copy security role 🧷 Rename security role 🗎 Delete 🗟 Save 🚔 | Save + close Configure column view \vee | |
| ណ៍ | } Home | | Environments > Net-Results > Settings > Security roles > 1 | Net-Results Sync for Dynamics 365 | |
| Ø | Environments | | ∧ Details | | |
| Ŀ | Analytics | \sim | Business unit: | | |
| | Billing (Preview) | \sim | When role is assigned to a Team | | |
| ŝ | 3 Settings | | Team member gets all team privileges by default. Team members can inherit team privileges directly based on access level. <u>Learn More</u> | | |
| | Resources | \sim | Member's privilege inheritance | | |
| C | Help + support | | Direct User (Basic) access level and learn priv V | | |
| G | b Data integration | | Tables Miscellaneous privileges Privacy-related privileges | | |
| G | Data (preview) | | Show only assigned privileges | | |
| 6 | Policies | \sim | | | |
| 4 | Admin centers | \sim | Display Name ↑ Na | lame | Privilege Level |
| | | | View Audit Summary pr | rvReadAuditSummary | 🖁 Organization |
| | | | | | |

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If you are syncing any additional Standard or Custom Entities to Net-Results, find them under 'Core Records' or 'Custom Tables' and grant 'Organization' in the 'Read' column, then click on 'Save' or 'Save + close'

| | Power Platform | n adn | nin center | n center | | | | | | |
|----------------|--|---|------------------|---|-------------------------------------|----------------------------|------------------------|---------------------------|-----------|-----------|
| = | | 🖏 Permission Settings 🖷 Copy table permissions 🗈 Copy security role 🧷 Rename security role 📋 Delete 层 Save 👹 Save + close Configure column view | | | | | | ure column view $ 	imes $ | | |
| ŵ | Home | | O You have | unsaved changes pending (marke | d with a **). | | | | | |
| 8 | Environments | | Envir | onments > Net-Result: | s > Settings : | > Security roles > 1 | Net-Results Sync for I | Dynamics 365 | | |
| Ŀ | Analytics | \sim | ∧ De | etails | | | | | | |
| 56 | Billing (Preview) | \sim | Busine | ss unit: cdnma | | | | | | |
| ۲ | Settings | | When | role is assigned to a Team | | | | | | |
| 5 | Resources | \sim | Team m Team m | ember gets all team privileges b rembers can inherit team privileg | vy default. ges directly based o | n access level. Learn More | | | | |
| 0 | Help + support | | Memb | er's privilege inheritance | | | | | | |
| 6. | Data integration | | Direct | User (Basic) access level and lev | am priv V | | | | | |
| Ģ | Data (preview) | | Tables | Miscellaneous privileges | Privacy-relat | ed privileges | | | | |
| D ₀ | Policies | \sim | Show | all tables 🗸 🗸 | 7 | | | | | |
| ۵ | Admin centers | \sim | | | _ | | | | | |
| | | | ~ | Table † | | Name | Record owner | ship Permission Setti | Create | Read |
| | | | ~ | Custom Tables (644) | | | | | | |
| | | | | AAD User | | aaduser | Organization | No Access | | ⊗ None |
| | | | | Al Builder Dataset | | msdyn_albdataset | User or Team | No Access | ⊗ None | ⊗ None |
| | | Al Builder Dataset File … msdyn_albdatasetfile User or Team No Access 🚫 None 🚫 None | | | | | | None None | | |
| | Control Contro | | | | | | Privilege Dropdown | | | |
| | | | | Al Builder Datasets Container | | msdyn_aib datasets contain | er User or Team | No Access | None None | None None |

Create the Application User and attach the Security Role

A Microsoft Power Platform Administrator is required.

Login to Microsoft Power Platform at:

https://admin.powerplatform.microsoft.com/

In the left nav, click on 'Environments' and click on the same environment the Security Role was imported into.

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| E Power Platform adm | Power Platform admin center | | | | | | | | | |
|-----------------------------|-----------------------------|------------------------|------------|--|--|--|--|--|--|--|
| = | + New 🖒 Refresh 🗟 Recentl | y deleted environments | D Environr | | | | | | | |
| 合 Home | Environments | | | | | | | | | |
| 盘 Environments | | | | | | | | | | |
| 🗠 Analytics 🗸 🗸 | Environment | Туре | | | | | | | | |
| 🔄 Billing (Preview) 🗸 🗸 | Net-Results Dev | ··· Sandbox | | | | | | | | |
| 🔅 Settings | Net-Results (default) | ··· Default | | | | | | | | |
| Resources 🗸 🗸 | Net-Results | ··· Production | ı | | | | | | | |

Click on 'See all' under 'S2S apps' (Server To Server Applications)

| | Power Platforr | m adm | in center | | | | |
|----|--------------------|--------|---|--|--------------------------------|--------------|------------------|
| = | | | 🗅 Open 🗟 Resources 🗸 🛞 Settings 📫 G | Convert to sandbox 👋 Backup & Restore 🗸 🛛 | 🗋 Copy 📋 Delete 🕤 History | | |
| ណ៍ | Home | | Environments > Net-Results | | | | |
| æ | Environments | | | | | | |
| | Analytics | \sim | Details | | | See all Edit | Access |
| 20 | Billing (Preview) | \sim | Environment URL | State | Region | | Security roles |
| | Settings | | net-results.crm.aynamics.com | Ready | United States | | see an |
| 20 | Resources | \sim | Refresh cadence Moderate | Type Production | Security group Not assigned | | Teams See all |
| e | Help + support | | Organization ID e78e32ea-ee3e-4028-aa1d-34658fb175c3 | Environment ID 391ad69b-293a-453a-b3eb-e3f13db7ef82 | | | Users See all |
| G | , Data integration | | | | | | S2S apps |
| Ģ | Data (preview) | | | | | | See all |

Click on 'New app user'

| | Power Platform admin center | | | | | | | |
|----------------|---|--|--|--|--|--|--|--|
| = | + New app user | | | | | | | |
| 습 Home | Environments > Prod > Settings > Application users | | | | | | | |
| A Environments | Manage the non-interactive users in this environment so your apps can access Dataverse data. Learn more | | | | | | | |

In the modal that opens, select the 'Business unit' you are granting permissions to, select the 'Net-Results Sync for Dynamics 365' 'Security role', and then click 'Add an app'

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Create a new app user

| App * + Add an app | |
|-----------------------------------|--------|
| Business unit * | |
| orgf3c46f13 | \sim |
| Security roles(1) | Ø |
| Net-Results Sync for Dynamics 365 | |
| | 11 |

In 'Add an app', paste in the Application ID 'f41adf61-824b-41ba-8c81-0f17fe22b244' and it will find the 'Net-Results Sync for Dynamics 365' app, then select it and click 'Add'

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\leftarrow Add an app from Microsoft Entra ID

f41adf61-824b-41ba-8c81-0f17fe22b244

There could be multiple reasons why your app may not show up in the list. Learn more





Then click on 'Create'

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| Create a new app user | | | |
|-----------------------------------|--------|--|--|
| | | | |
| App * | | | |
| Net-Results Sync for Dynamics 365 | Ø | | |
| Business unit * | | | |
| orgf3c46f13 | \sim | | |
| | | | |
| Security roles(1) | Ø | | |
| Net-Results Sync for Dynamics 365 | | | |
| | | | |
| | | | |
| | | | |



It will take a few moments to complete. You will see the new user in the list with a # in front of the name

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| | Power Platform a | lmin center | | |
|---|-------------------|--|--|--|
| ≡ | | + New app user | | |
| ŵ | Home | ⊘ '# Net-Results Sync for Dynamics 365' has been successfully added to this environment. | | |
| ݠ | Environments | Environments > Prod 2 > Settings > Application users | | |
| Ŀ | Analytics 🔨 | Manage the non-interactive users in this environment so your apps can acce | | |
| ÷ | Billing (Preview) | Name App | | |
| ŝ | Settings | # Net-Results Sync for Dynamics 365 f41a | | |

Click on the new user to select it and then click on 'Details'

| E Power Platform admin center | | | | | |
|-------------------------------|-------------------|--------|---|--------------|---------|
| ≡ | | | 🛈 Details 🖉 Edit security roles 🚫 Deactivate | | |
| ல் | Home | | \bigcirc '# Net-Results Sync for Dynamics 365' has been successfully added to | this enviror | nment. |
| ₽ | Environments | | Environments > Prod 2 > Settings > Applica | ntion us | ers |
| Ŀ | Analytics | \sim | Manage the non-interactive users in this environment so yo | ur apps c | an acce |
| ÷ø | Billing (Preview) | \sim | Name | | Арј |
| ٢ | Settings | | # Net-Results Sync for Dynamics 365 | : | f41a |

In the 'Details' modal, click on the Update Application Name button to sync the user to the app

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| Details | | × | | | | |
|--------------------------------------|--------|---------------|--|--|--|--|
| Name | | \bigcirc | | | | |
| # Net-Results Sync for Dynamics 365 | | | | | | |
| Microsoft Entra ID app name | | | | | | |
| Net-Results Sync for Dynamics 365 | | | | | | |
| App ID | | | | | | |
| f41adf61-824b-41ba-8c81-0f17fe22b244 | | | | | | |
| State | | | | | | |
| Active | | | | | | |
| Security roles(1) | | Ø | | | | |
| Name ↑ | Туре | Business unit | | | | |
| Net-Results Sync for Dynamics 365 | Direct | orgf3c46f13 | | | | |

The # in front of the Name will disappear when successful. Click on the X.

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| Details | | \times | | |
|---|------------------|---------------|--|--|
| O This app user's name has been success | ssfully updated. | × | | |
| Name | | | | |
| Net-Results Sync for Dynamics 365 | | | | |
| App ID | | | | |
| f41adf61-824b-41ba-8c81-0f17fe22b244 | | | | |
| State | | | | |
| Active | | | | |
| Security roles(1) | | Ø | | |
| Name ↑ | Туре | Business unit | | |
| Net-Results Sync for Dynamics 365 | Direct | orgf3c46f13 | | |

Enable The Syncs In Net-Results

A Net-Results User with permission to view the integration settings is required. Login to Net-Results at: <u>https://www.net-results.com/app/login.php</u> Navigate to the Dynamics Sync Options: <u>https://apps.net-results.com/app/DynamicsIntegration/options</u>

Check the 'Syncs Enabled' checkbox and click 'Save'

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| Narketing Center + Contacts & Accounts + Segments + Re | porting 🔹 Create New 🔹 |
|--|-----------------------------------|
| Dynamics Sync Options Options | Green Field Mappings Green Sync E |
| | |
| Syncs Enabled | |
| Full Sync and Error Notification Recipient(s): (Separate multiple addresses with commas) | |
| support@net-results.com | |
| When syncing Contacts/Leads from Dynamics, only sync records that have email addresses | s |
| Allow Dynamics to Write Empty Fields to Net-Results | |
| Allow Net-Results to Write Empty Fields to Dynamics | |
| Sync Lead Score Changes To Dynamics | |
| Sync Only The Lead Score On A Lead Score Change | |
| ✓ Do Not Sync Inactive Items | |
| Sync Marketing Lists from Microsoft Dynamics to Net-Results | |
| Default Account Name | |
| (Unknown) | |
| Default Last Name | |
| (Unknown) | |
| Last Full Sync | |
| 09/07/2023 at 01:15 PM | |
| | |
| | |
| | Contact Support |
| | ∞∠υ∠3 Net-Results |
| | |

Save Cancel

Full Sync From Dynamics

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To confirm the new application is working, navigate to the Field Mappings page at: https://apps.net-results.com/app/DynamicsIntegration/mapping

This will take a few moments to load. If you see the field Mappings listed, everything is working! 🙂

Marketing Center 🔹 Contacts & Accounts 🔹 Segments 🔹 Reporting 🔹 Create New 🔹

Dynamics Sync Field Mappings Opnamics 365 Admin Consent Sync Errors

| Dynamics Field | Net-Results Field | | To Dynamics | From Dynamics |
|-----------------------------|-------------------------|---|--------------|---------------|
| (Deprecated) Process Stage | Do Not Map | ~ | | |
| (Deprecated) Traversed Path | Do Not Map | ~ | | |
| Account | Do Not Map | ~ | | |
| Account Name | Account Name | ~ | \checkmark | 1 |
| Account Number | Account Number | ~ | | |
| Account Rating | Do Not Map | ~ | | |
| Address 1 | Do Not Map | ~ | | |
| Address 1: Address Type | Do Not Map | ~ | | |
| Address 1: City | Account Billing City | ~ | | |
| Address 1: Country/Region | Account Billing Country | ~ | | |
| Address 1: County | Do Not Map | ~ | | |

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