

TextUs + Microsoft Dynamics Integration Setup Instructions

The steps below will walk you through the complete integration setup for Dynamics until it can become more streamlined. Below are the instructions for setting up the integration from scratch and the data that needs to be collected.

By the end of this process, you should have captured the following information needed to complete the integration setup. This information will need to be provided to the TextUs team.

- Dynamics URL:
- Tenant ID:
- Client ID:
- Client Secret:

Step 1: Collect the Tenant ID

1. Go to the [Microsoft Entra - Azure Overview](#) page.
2. Navigate to Azure Active Directory > Overview. The Tenant ID will be listed within the Basic Information below Name.

Step 2: Create a New App Registration

1. Go to the [Microsoft Entra - App Registration](#) page.
2. Click **New registration**.
3. Under Name, enter TextUs.
4. Under Supported account types, select “Accounts in this organizational directory only (TextUs only - Single tenant)”.
5. Click **Register**.
6. Under the list of Owned applications, collect the **Application (client) ID** listed for TextUs.

Register an application ...

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

TextUs

Supported account types
Who can use this application or access this API?

Accounts in this organizational directory only (TextUs 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...](#)

Step 3: Create Client Secret & Collect the Value

1. Go to **Certificates & secrets**, then click **New client secret**.
2. Under Description, enter 'production'.
3. From the Expires dropdown, select **24 months**.
4. Click **Add**.
5. Once the client secret is created, you will need to immediately copy the **Value** (NOT the Secret ID) to your clipboard for your records. This value will not be able to be retrieved later.

Add a client secret ×

Description

Expires

Step 4: Add API Permissions

For this step, you will need to add two API permissions: one for the Dynamics CRM, one for Microsoft Graph.

1. From the **API permissions** page, you will need to add a permission for the Dynamics CRM and Microsoft Graph.
2. For the Dynamics permission:
 - a. Select **Delegated permissions**.
 - b. Select the 'user_impersonation' permission.

- c. Click **Add permission**.
3. For the Microsoft Graph permission:
 - a. Select **Delegated permissions**.
 - b. Search for the 'Directory.ReadWrite.All' permission and select the checkbox.
 - c. Click Grant admin consent for {Tenant Name}.
 - d. Click **Add permission**.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for TextUs

API / Permissions n...	Type	Description	Admin consent req...	Status
▼ Dynamics CRM (1) ***				
user_impersonatio	Delegated	Access Common Data Service as ...	No	✓ Granted for TextUs ***
▼ Microsoft Graph (2) ***				
Directory.ReadWrit	Delegated	Read and write directory data	Yes	✓ Granted for TextUs ***
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for TextUs ***

Step 5: Create Application User

[Power Platform admin center](#)

1. Select the Environment containing your Dynamics instance,
2. Navigate to S2S users.
3. Click New app user and set the following:
 - App: TextUs
 - Business unit: Your Dynamics instance
 - Security Roles:
 - Activity Feeds
 - App Profile User
 - Basic User
 - Bot Author
 - Customer service app access
 - Sales system access

Create a new app user ✕

App *
TextUs ✎

Business unit *
org54f3edae ▾

Security roles(6) ✎

- Activity Feeds
- App Profile User
- Basic User
- Bot Author
- Customer service app access
- Sales system access

Step 6: Update the TextUs User Icon

1. Enter your Dynamics Environment.
2. Go to Advanced Settings > Security > Users.
3. Search for “# TextUs”.
4. Click the Avatar.
5. Use the following image: [TextUsAppIcon.png](#)

