dox42 D365 CE| Dynamics CRM

Documentation

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DOCUMENT DETAILS

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1. What is dox42 D365 CE|Dynamics CRM?

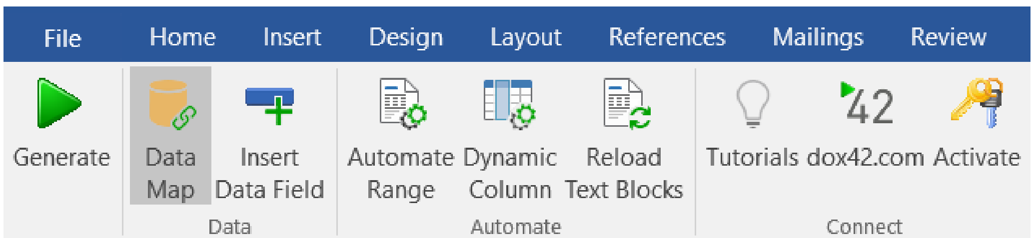
The dox42 D365 CE|CRM data source enables you to use Dynamics CRM data for document automation. Additionally, other data sources (e.g. SharePoint, XML/JSON, SQL, Webservices, Excel, etc…) can be integrated into one document at the same time.

dox42 D365 CE|CRM is an additional module for dox42. dox42 D365 CE|CRM contains a dox42 Custom Data Source, a dox42 Custom Output Action for MS Dynamics CRM/MS Dynamics 365 for Customer Engagement (D365 CE) and a dox42 solution for easy integration with your MS Dynamics CRM/CE interface.

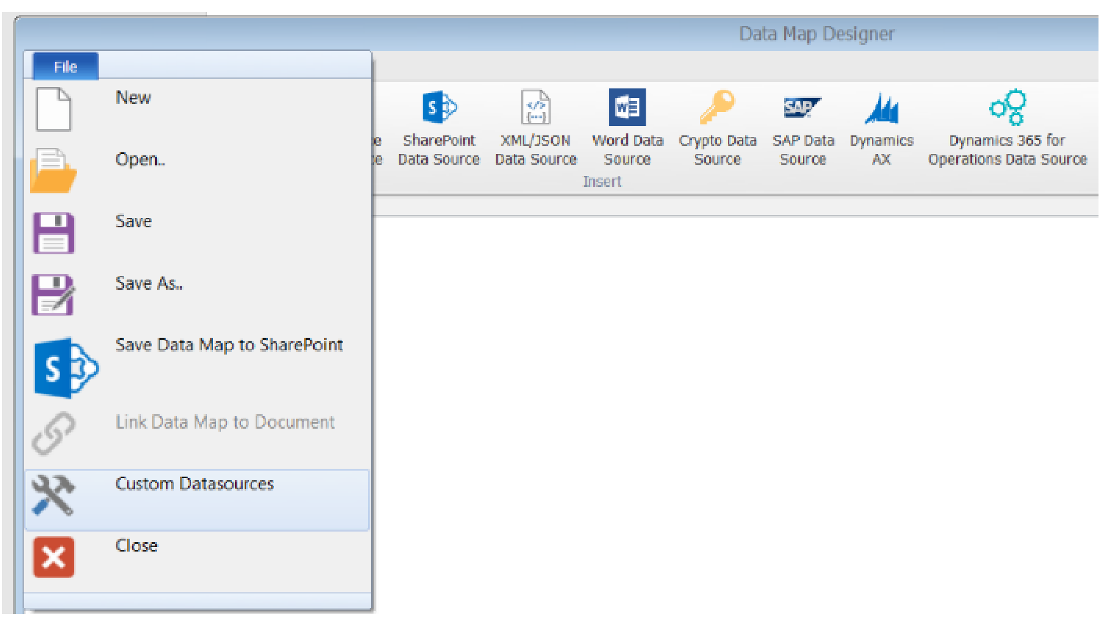
2. Installation of the dox42 Office Add-Ins

Save the dox42 D365 CE|CRM files to a fixed directory on the computer, on which you want to use dox42. To do that, just unzip the file **dox42DynamicsCRM_V*.zip.**

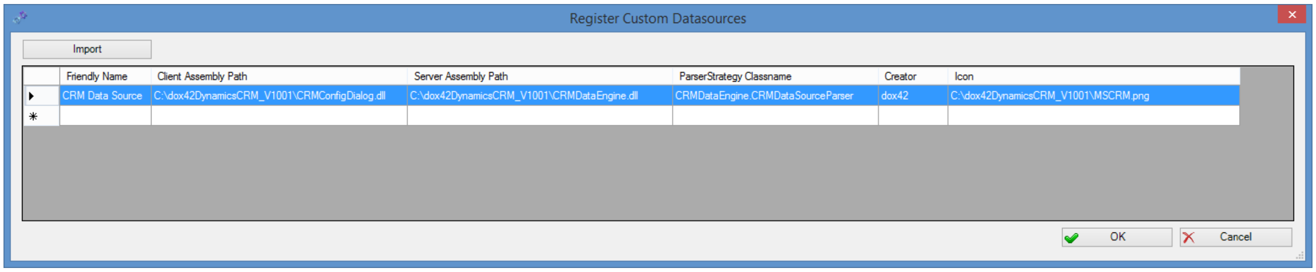
Start Word/Excel, activate the dox42-Ribbon and select **„Data Map”.**



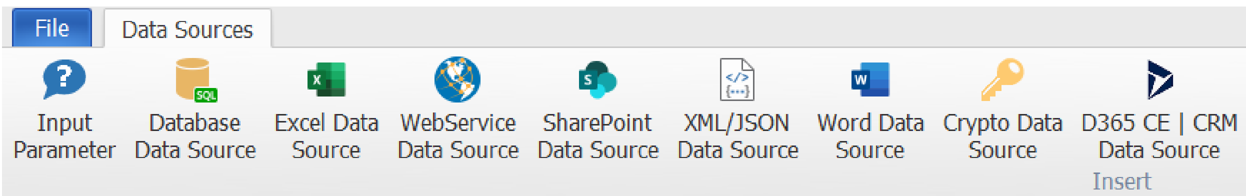
In the Data Map Designer select **„Data Map“.** Open the File-Menu and select **„Custom Datasources“.**



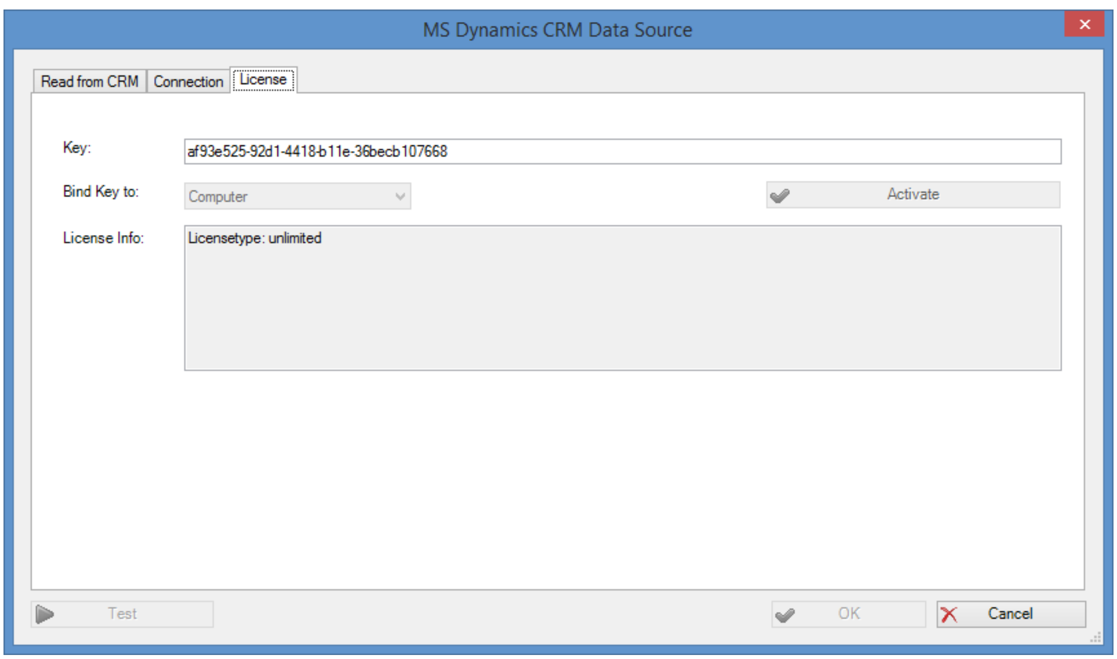
In the dialogue **„Register Custom Datasources“,** you can import the Import Configuration **(dox42DynamicsCRMmport.config).**



Now, the dox42 D365 CE|CRM Data Source is ready for use as any other dox42 data source.



Now you need to activate your license key. To do that, simply select your CRM Data Source, open the configuration dialogue and move to the register **"License".** Insert your license key here and click "Activate".



In case you get the error: Microsoft.IdentityModel could not be found, please make sure that Windows Identity Foundation is installed on your machine.
You can activate Windows Identity Foundation via the Control Panel > Turn Windows Features on or off > Tick the box at "Windows Identity Foundation 3.5".

Also you need .NET Framework 4.5.2 or higher installed.

3. Installation of dox42 D365 CE|CRM for dox42 Server (on Premise)

In order to use dox42 D365 CE|CRM on the dox42 Server, please copy the following assemblies to the /Bin directory of your Server:

- CRMDataEngine.dll
- CRMLicence.dll
- CRMOutputAction.dll
- Microsoft.Crm.Sdk.Proxy.dll
- Microsoft.Xrm.Sdk.dll

You need .NET Framework 4.5.2 or higher installed on the server.

Now dox42 D365 CE|CRM Data Source has to be registered in the **web.config** of your server.

```
<customDataSources>
        <add key="CRMDataEngine.CRMDataSourceParser"
             value="CRM Data Source;c:\dox42Server\bin\CRMDataEngine.dll;"/>
</customDataSources>

<customOutputActions>
        <add key="CRMOutputAction.CRMOutputAction"
            value="CRMOutputAction; c:\dox42Server\bin\CRMOutputAction.dll;" />
 </customOutputActions>
```

Furthermore, please insert the license key in the **web.config**:

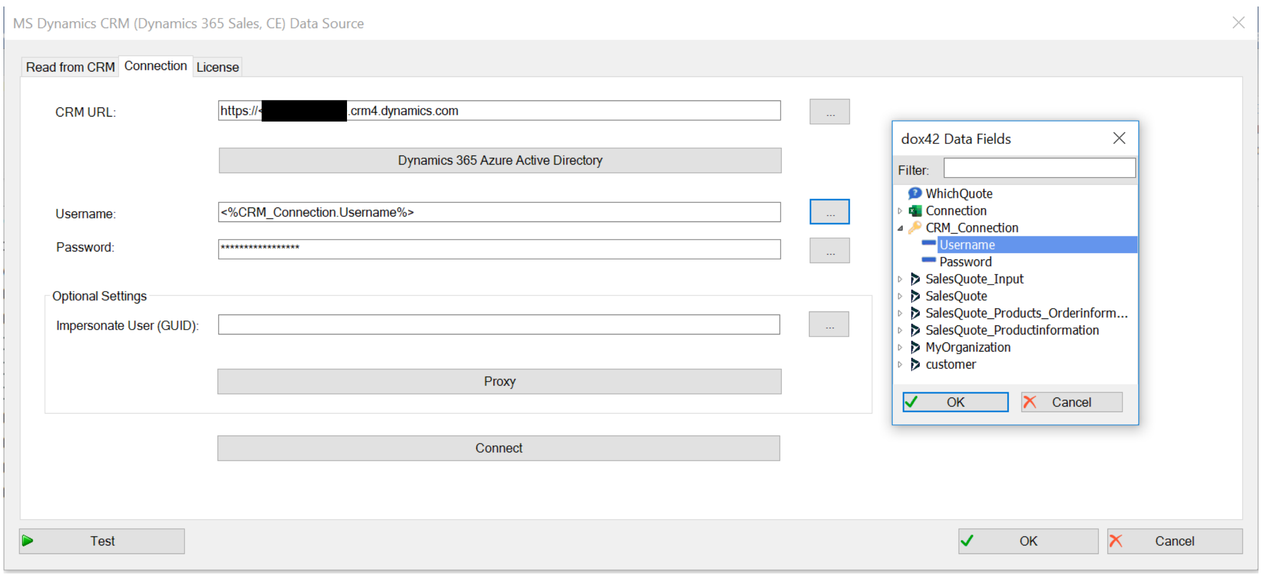
```
<appSettings>
        <add key="LicenseFilePath" value="c:\dox42Server\License" />
        <add key="LicenseKey" value="…"/>
        <add key="dox42CRMLicenseKey" value="…"/>
        …
</appSettings>
```

Also have a look at the dox42 Server Documentation: http://www.dox42.com/Modules/dox42-Server.

4. Data integration with dox42 D365 CE|CRM

4.1. Connection to MS Dynamics CRM or D365 CE

In the data map designer of your add-in, configure the connection to CRM in the register **"Connection".** You can define data fields of any other data source for every value. This way, you could keep the configuration for example in an Excel or XML file. Of course, you can simply enter the values as well. Your username and password can be encrypted with the dox42 Crypto Data Source.



If you connect to MS CRM online (MS Dynamics 365 for Customer Engagement), then your CRM URL would look similar to: https://<Yourcompany>.crm4.dynamics.com

You can also connect to MS CRM 2011, 2013, 2015, 2016 on-premises.

The dox42 D365 CE|CRM Data Source will call the XRMService.

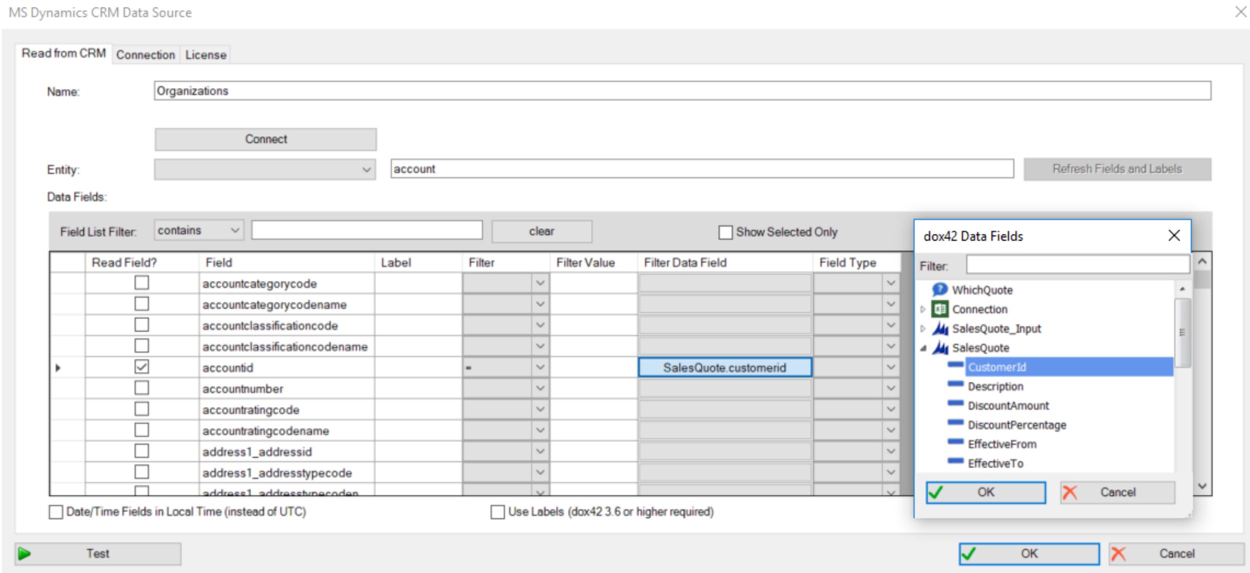
Use "Impersonate User (GUID)" together with a Service-User Username/Password to impersonate a specific user. For impersonation with the currently logged in user, use the input Parameter UserID.

You may also specify Proxy settings, these are used from the dox42 Add-In only, and ignored on the dox42 Server.

4.2. Connection to MS Dynamics CRM or D365 CE with Azure Active Directory

Instead of connecting to your D365 CE or Dynamics CRM instance with your username and password, you can connect with Azure Active Directory (see a detailed instruction on how to set up your AAD configuration in chapter 6).

4.3. Read Data from MS Dynamics CRM or Dynamics 365 for Customer Engagement



Press “Connect” to read the list of available entities from your CRM. Select the desired entity in the dropdown “Entity” and tick the desired fields in the list.

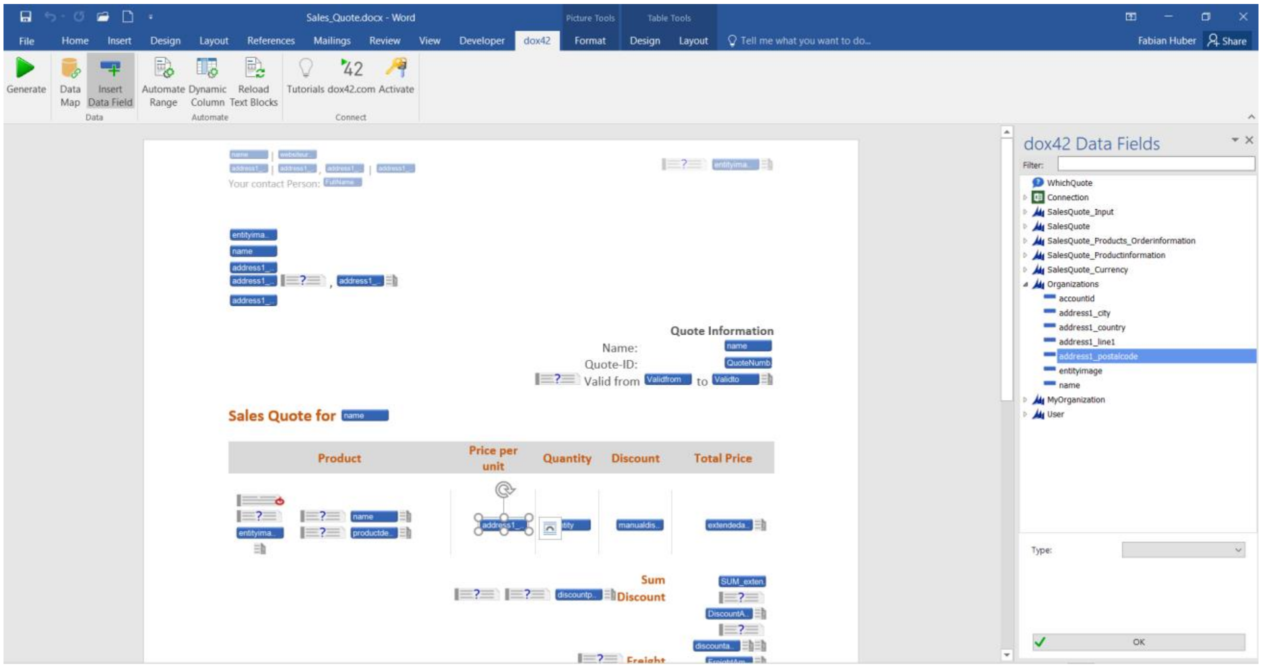
To set a filter just enter a value or choose a data field and choose the desired filter.

Dynamics CRM stores data/time fields in UTC. To transform all date/time fields to local time check “Date/Time Fields in Local Time (instead of UTC)”.

To get the CRM Labels as mouse-over tooltip in the dox42 data field explorer check “Use Labels.” You need dox42 version 3.6 or higher to use this function.

You may overwrite the labels adding you own comments. Also you can always refresh the labels and reload the fields from CRM by clicking “Refresh Labels and Fields”.

Now you can use data fields from MS Dynamics CRM like any other dox42 data fields.



4.4. How to get a full list of your fields and entities

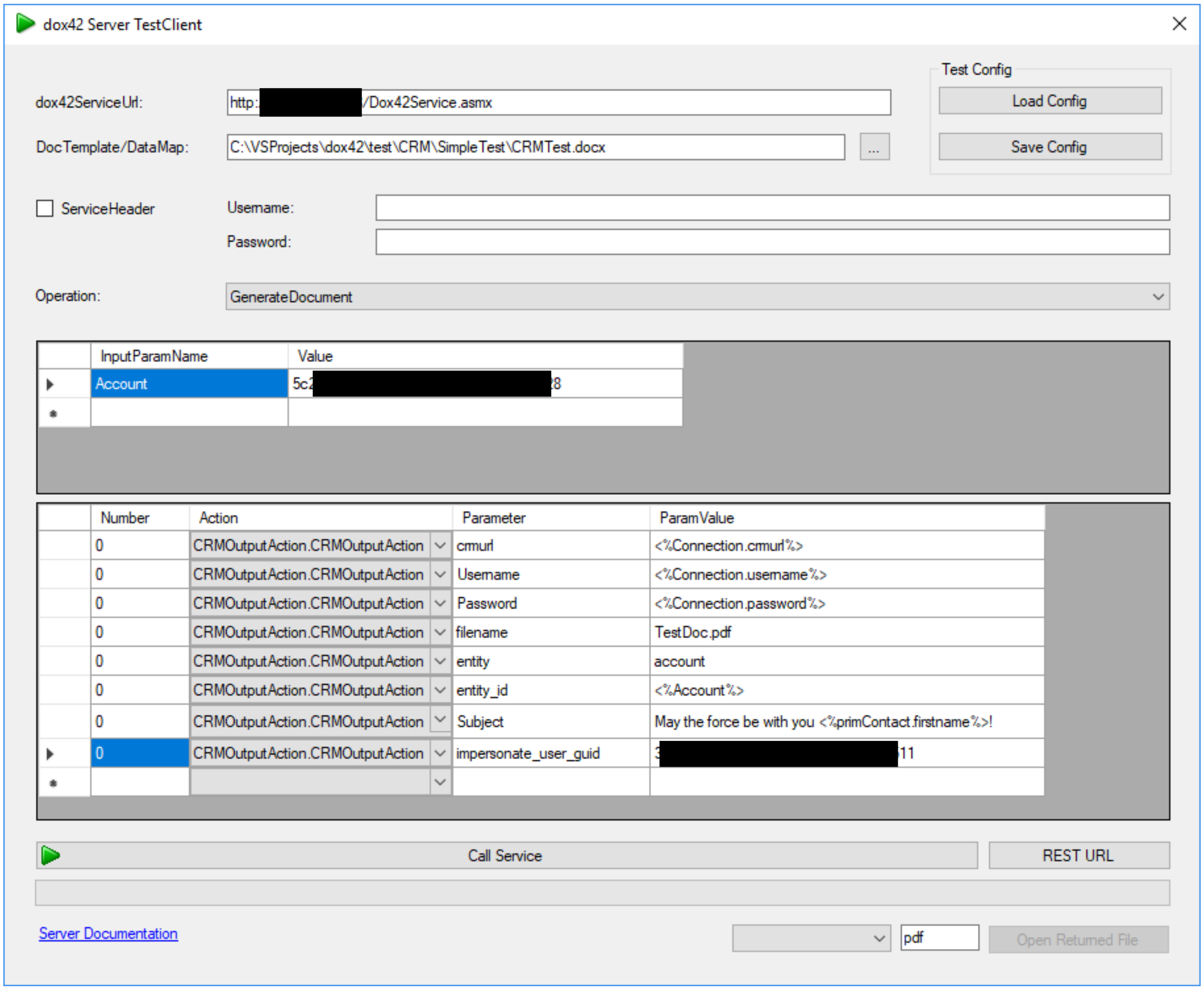
The dox42 D365 CE|CRM Data Source reads the field and entity names from MS Dynamics CRM. As there can be differences between the field name and the display name (e.g. because of language settings) we recommend you to work with the field and entity list given from MS Dynamics CRM. To get this list of field and entity names please do the following (for MS CRM Online, MS CRM 2013 and 2015 on-premises):

1. On the navigation bar click **Microsoft Dynamics CRM > Settings**.
2. Again on the navigation bar click **Settings** > **Customizations** > **Customize the System**.
3. To get the entity name:
    1. In the new window under **Components**, expand **Entities** and from this full list click on the entity you want.
    2. The next view contains the name and the display name of the entity.
4. To get the field name:
    1. In the new window under **Components**, expand **Entities** and from this full list expand the entity you want.
    2. Click **Fields** to get the list which contains names and display names.

5. dox42 D365 CE|CRM Output Action

Using the dox42 D365 CE|CRM Output Action for your dox42 Server calls, you can save generated documents to CRM as an annotation of an entity. E.g. you can attach a generated offer-document as an annotation to the corresponding offer in CRM.

You can use the dox42 D365 CE|CRM Output Action in the same way as any other dox42 output action, which can be found in the [dox42 Server documentation.]



5.1. Parameter

Parameter name	Requirement	Effect
CrmUrl	mandatory	https://yourcompany.crm4.dynamics.com
Username	optional	If you use a MS Dynamics CRM data source with Azure Active Directory in your document, you may omit the credentilas to use AAD authentication.
Password	optional	If you use a MS Dynamics CRM data source with Azure Active Directory in your document, you may omit the credentilas to use AAD authentication.
Impersonate_User_Guid	optional	To impersonate a different user. This is only possible together with Username/Password set.
Filename	mandatory	The filename of the document. The extension will define the format.
Entity	mandatory	The type of the entity you want to attach the document, e.g. account.
Entity_id	mandatory	The id of the entity you want to attach the document.
Subject	optional	You may use other data fields to create a dynamic subject (=Title), e.g.: "Offer for <%Customer.Name%>".
NoteText	optional	You may use other data fields to create a dynamic Description, e.g.: "Offer for <%Customer.Name%>".

6. Azure Active Directory Integration with D365 CE|CRM

Using dox42 with AAD and/or with **dox42 Online** (Saas), requires the following properties:

- **Application ID >** is provided after the app registration in the Microsoft Admin Center
- **Redirect URLs**
- **Tenant ID**
- **Client Secret for dox42 Server**

For the AAD integration, you have to configure a few settings in the Microsoft ***admin center***, in your dox42 Server and in the dox42 Add-In Datamap Designer.

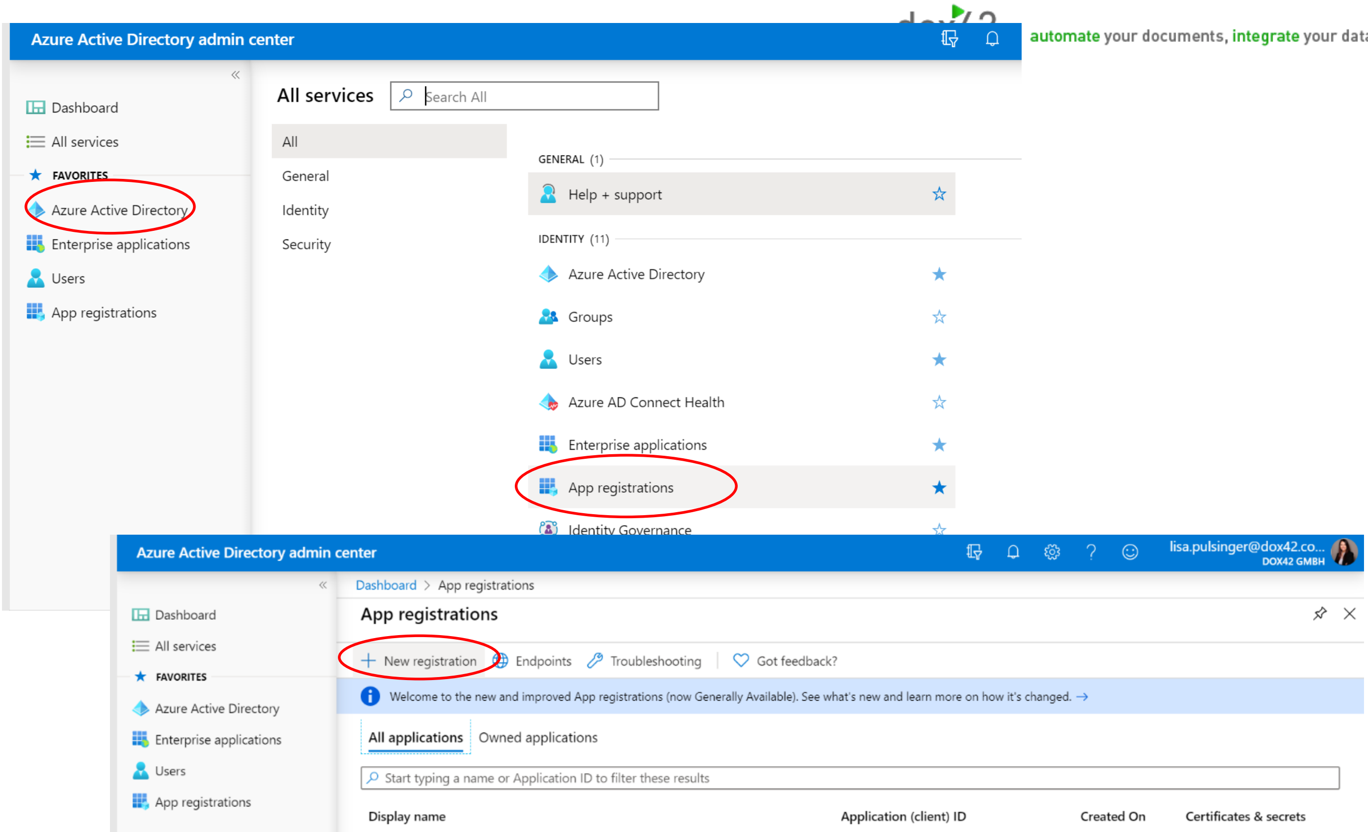
Please note: for the following steps you need (global-) Admin rights:

- App Registration
- Enabling required permissions
- Entering Redirect URL(s)
- Configuring AAD in the dox42 Add-In and **consent the** new application for the first time

6.1. dox42 App Registration

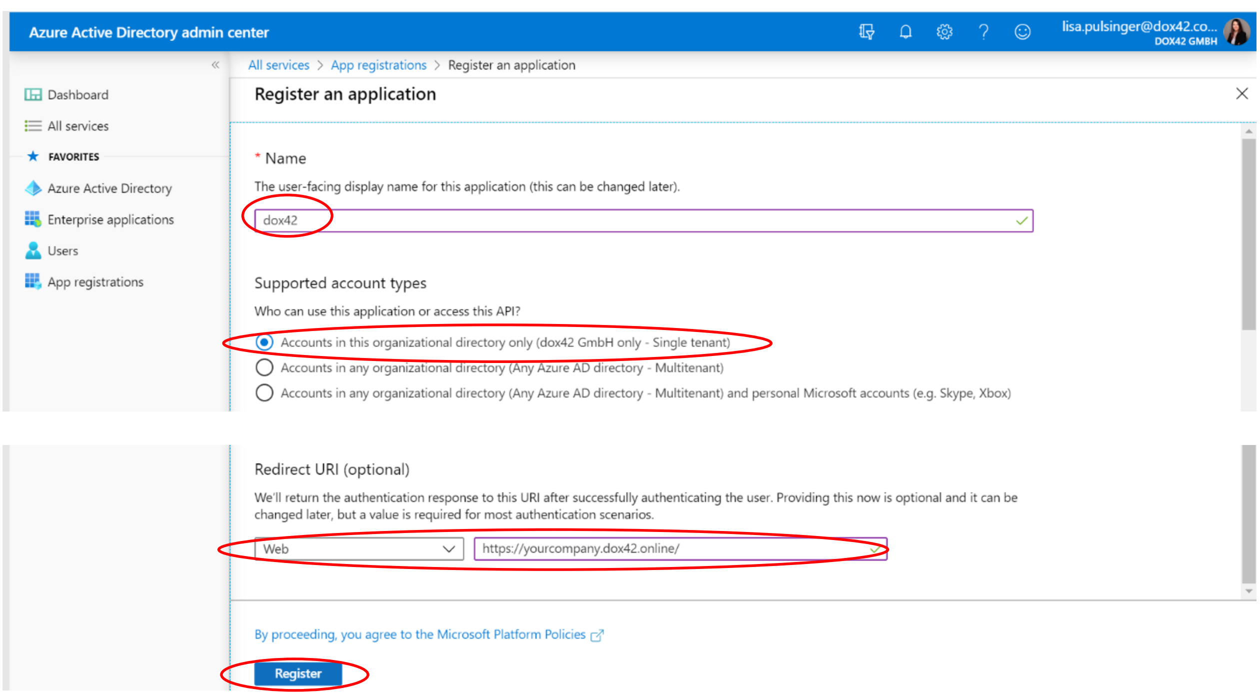
Firstly, you need to create an application in the Microsoft Azure AD admin center to set the AAD permissions for the dox42 Add-in and Server.

- Open the Office 365 Admin Center
- Go to -> **Admin centers** -> **Azure AD,** or click here in order to log in immediately: https://aad.portal.azure.com
- Click on **All services -> App registrations**
- **Click on New Registration**



Now configure your dox42 application:

Name your application accordingly, and choose which accounts should have access to your application. Also add a Web Redirect URI containing the link to your dox42 Server instance and click on Register.



Note: In this documentation, we use the redirect URL of a dox42 Online server (SaaS):

https://yourcompany.dox42.online/

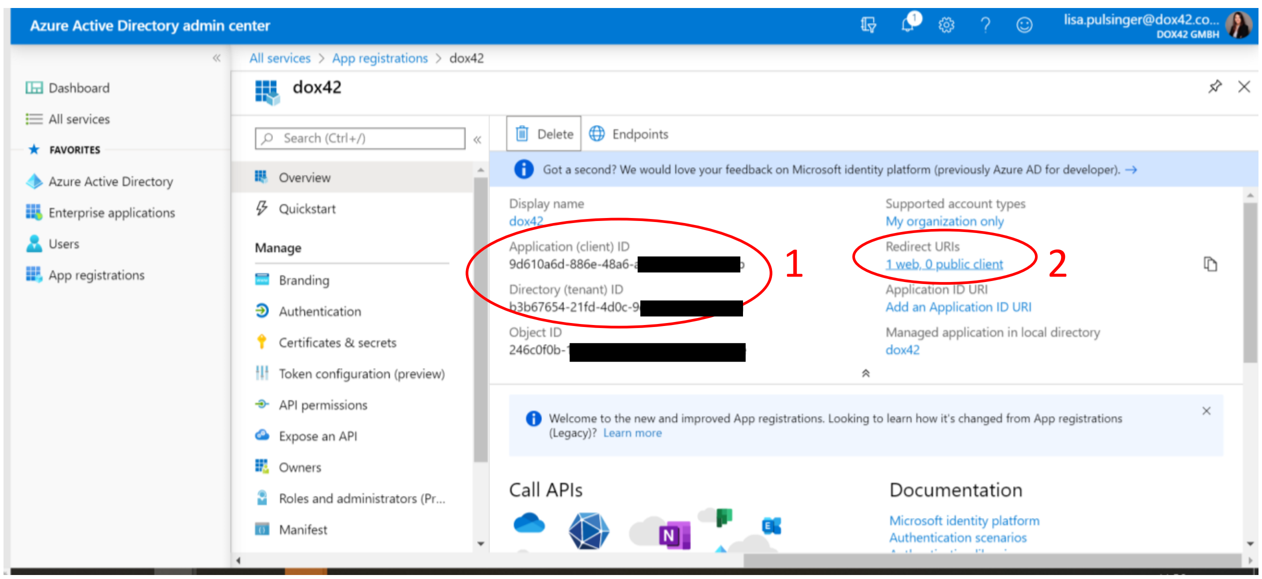
If you are registering a dox42 **on-premise server**, use the URL of your dox42 server:
https://yourdox42server.yourcompany.com

Now that you have registered your application, you can copy the Application (client ID) and Directory (tenant ID) (screenshot below 1) and paste it into an Excel Config file. This allows you to manage your configuration details centralized. See Chapter 6.1.6 for more information on Config files.

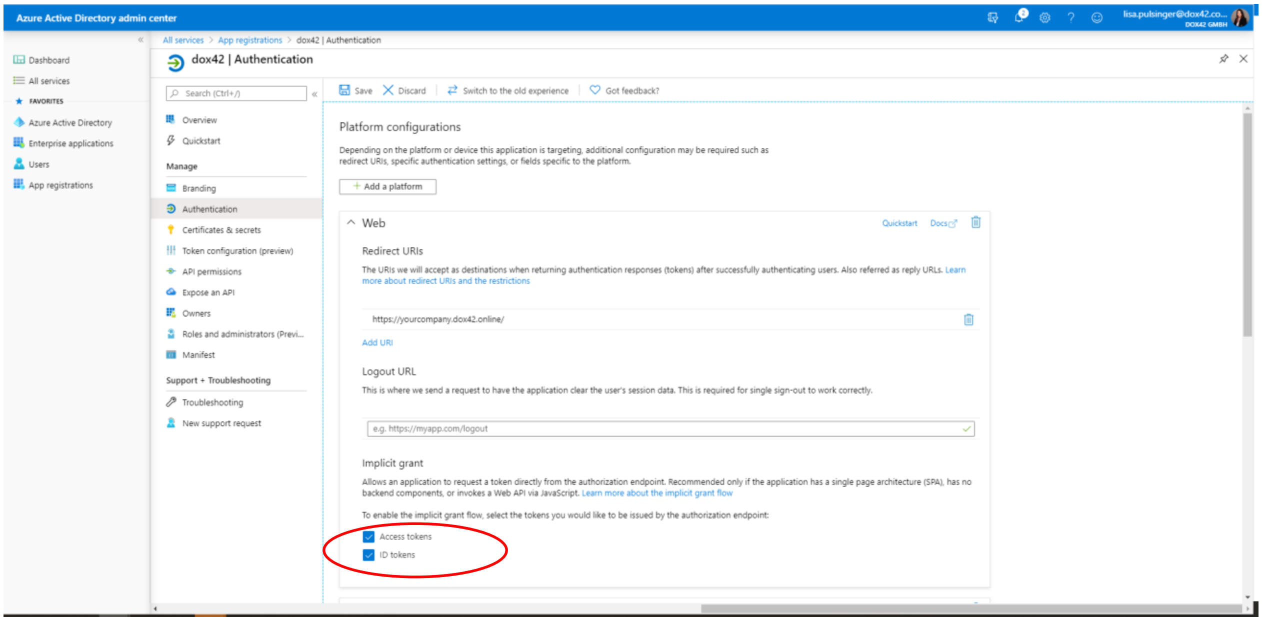
6.1.1. Token Permissions

Next, you need to grant token permissions for your app.

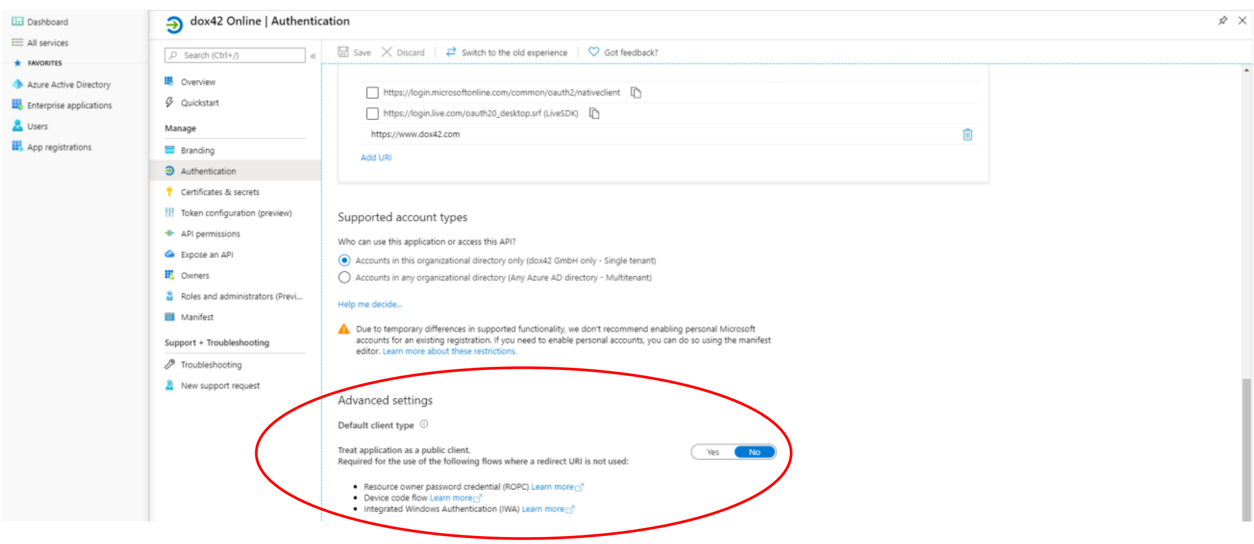
Within your newly added application, click on Redirect URIs (2).



Now, on the In the Implicit grants section of the Authentication register, tick both “Access tokens” and “ID tokens”:



Scroll down further to find additional settings. Under Advanced Settings keep "Treat application as a public client" set on No.



6.1.2. Enter Redirect URIs

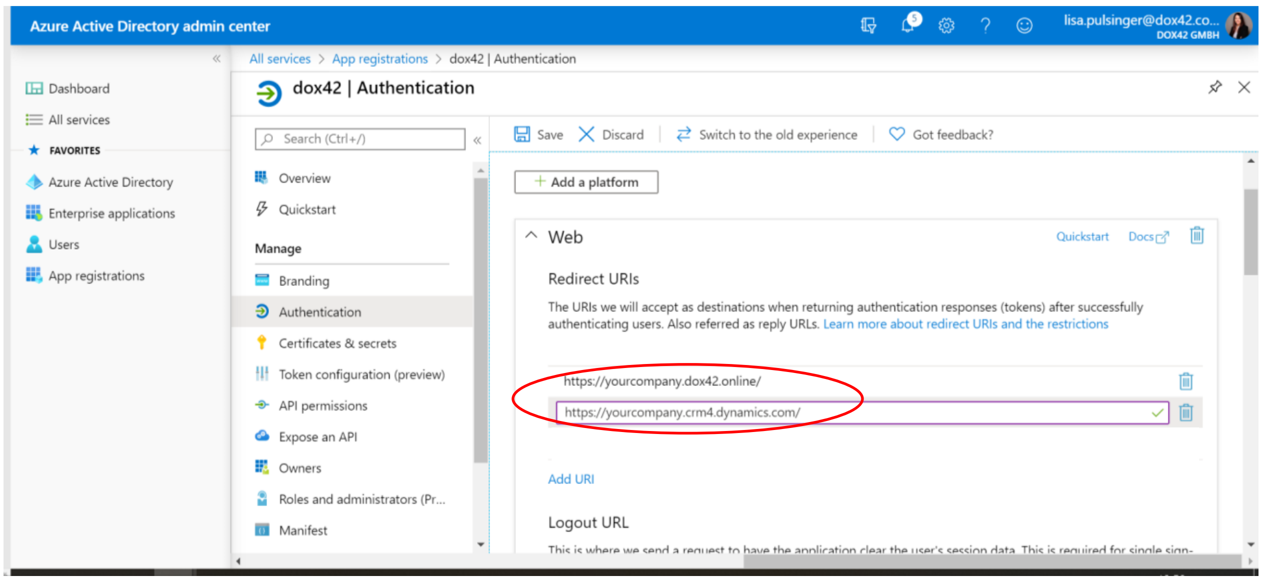
Now scroll up again to the beginning of your Authentication page. You need to add Redirect URIs next. Please specify the following:

- your dox42 online Server URL: https://yourcompany.dox42.online/
- your Dynamics 365 CE URL in the following format: https://Yourcompany.crm4.dynamics.com/

- any additional URIs for services you want to call. Enter this re-direct URI if you are calling dox42 from MS PowerAutomate (MS Flow): https://global.consent.azure-apim.net/redirect

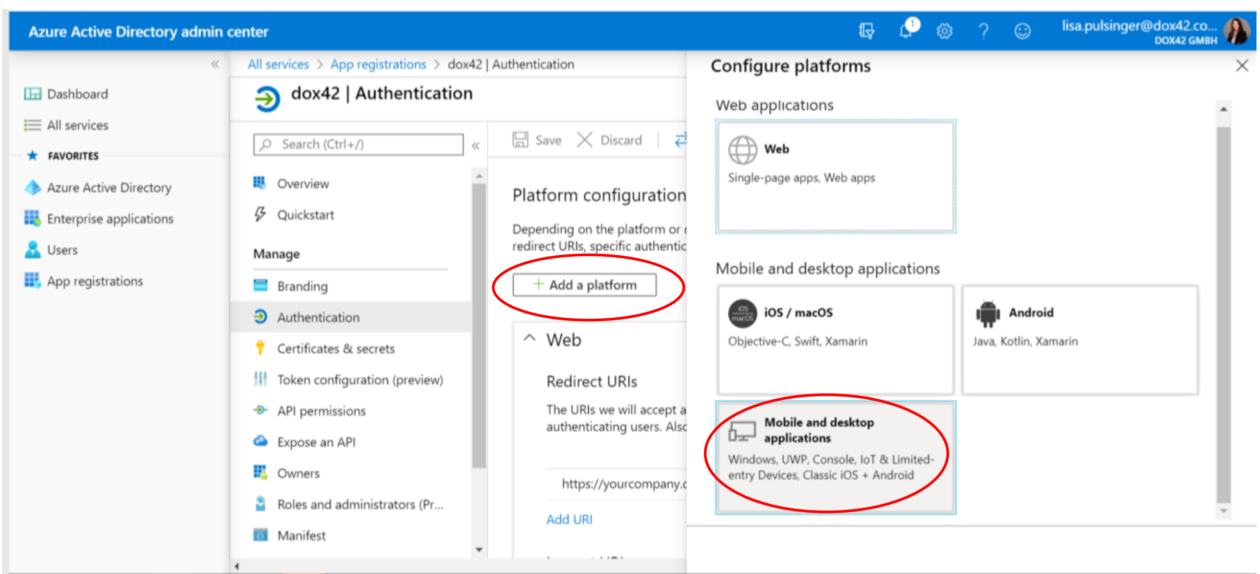
The URL that you include as the Server URI (http://.....dox42.online/) is the one you will need to include in the dox42 Server Configuration in the dox42 Datamap (see Chapter 6.4).

Note: You may NOT use wildcards (*). Microsoft changed this behavior during 2018, so you may find older working App registrations using wildcards, but new App registrations will not work with wildcards.

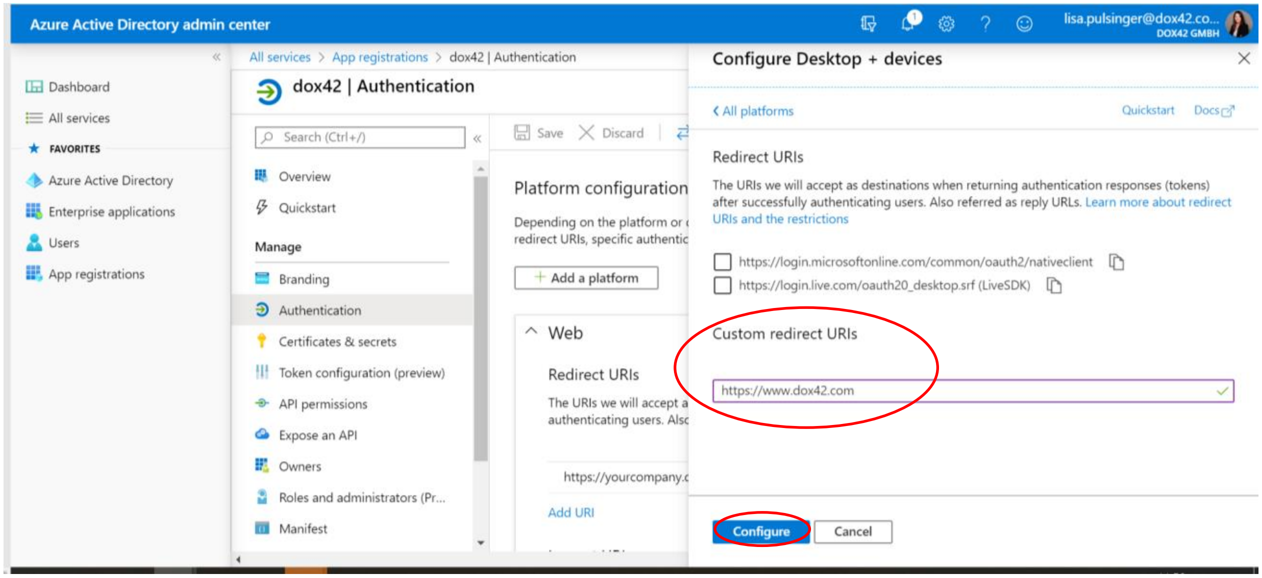


6.1.3. Add a mobile and desktop application for your dox42 Add-in

Now you need to add your dox42 Add-in as a "mobile and desktop application" to your app. On the top of the Authentication page, click on "Add a platform" and then on "Mobile and desktop application".

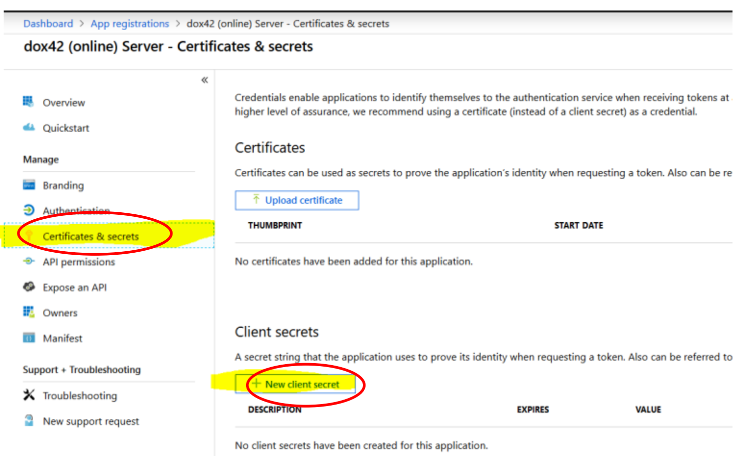


Add a Custom redirect URI for your dox42 Add-in – we are using https://www.dox42.com. Do not use the same redirect URI as for your web application. Then click on Configure.

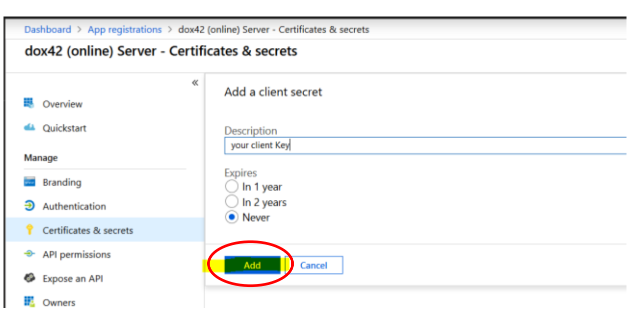


6.1.4. Add a Client Secret

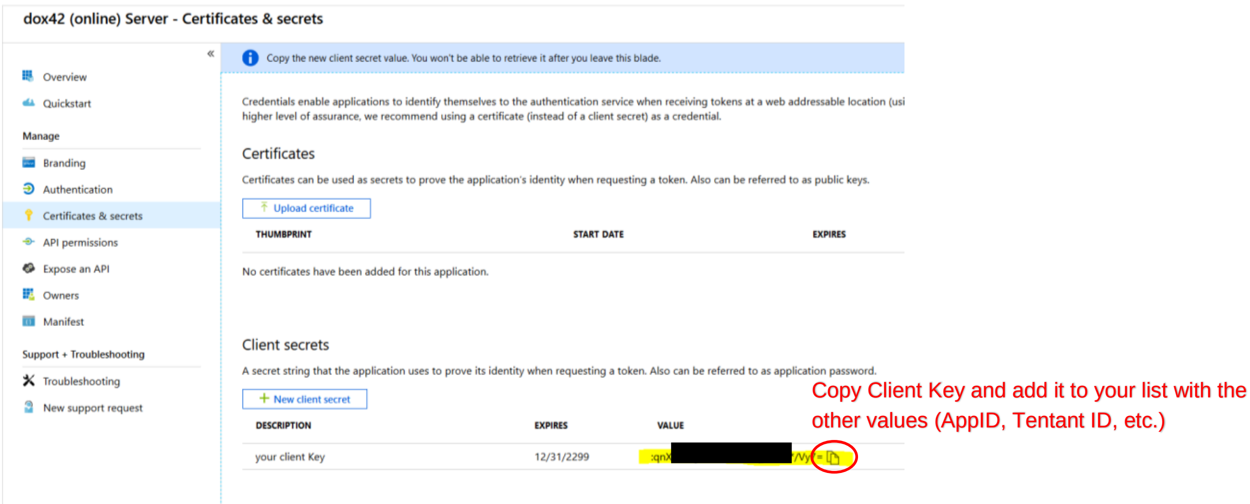
In the register Certificates and Secrets, you need to add a new client secret.



Select your required expiry date (we recommend using "Never") and click Add.



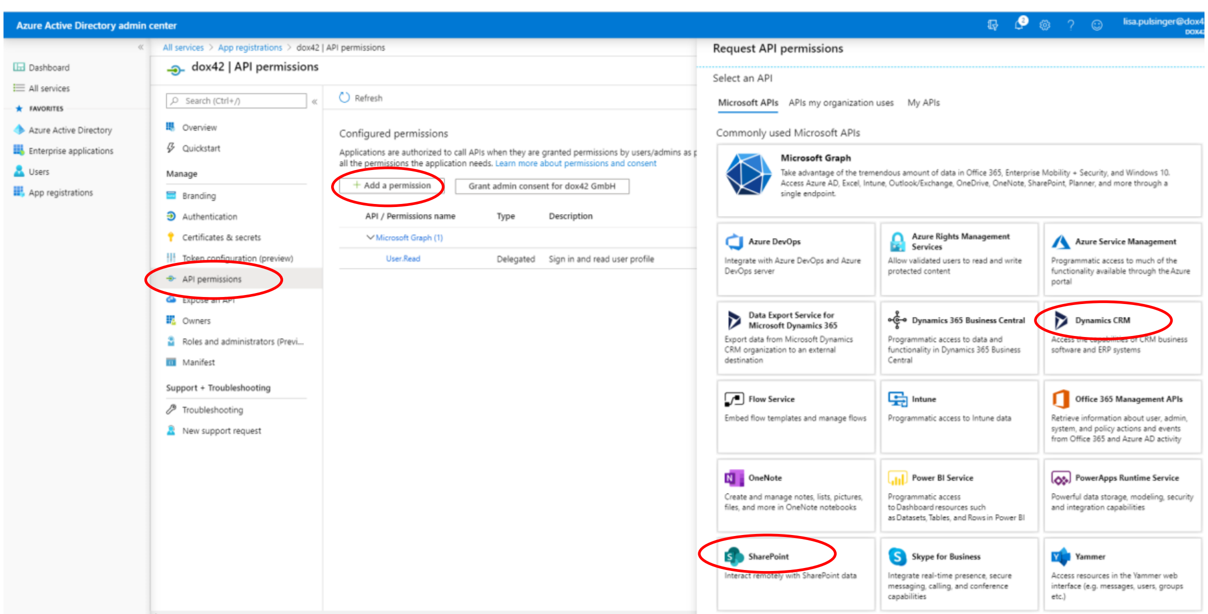
Make sure to COPY the ClientKey, as it will be hidden afterwards and you will <u>not</u> be able to retrieve it again:



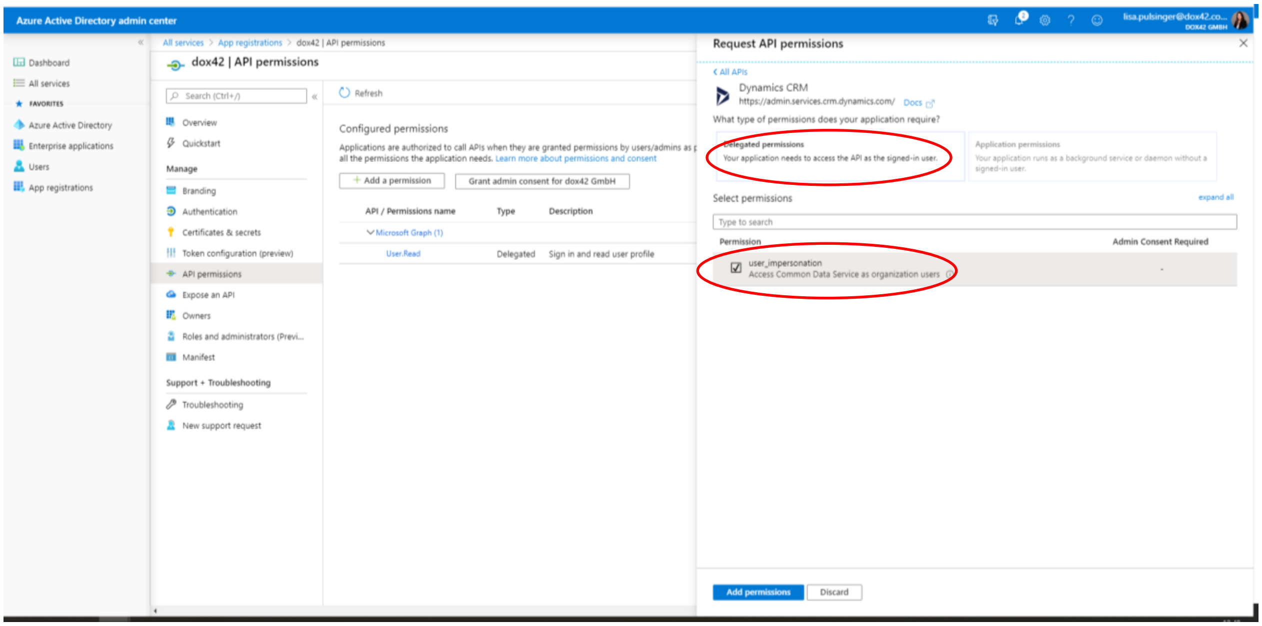
We copied the key into our Excel Config File, together with the other values of the app registration. When working with an Excel config file, we recommend to encrypt the values of the client key by using the dox42 Crypto Data source.

6.1.5. Add API Permissions

Move to the register API Permissions and click "Add a permission". You need to grant the application delegated permissions for Dynamics CRM and SharePoint Online (as your templates need to be stored on SharePoint Online, and you may be using dox42 SharePoint Output Actions).

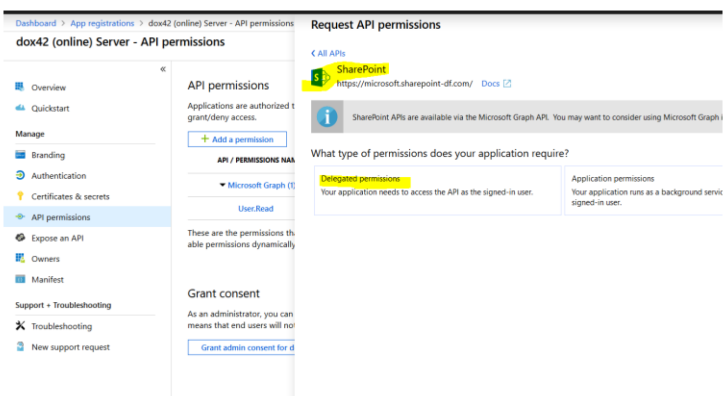


For Dynamics CRM you need to add Delegated user impersonation permissions.

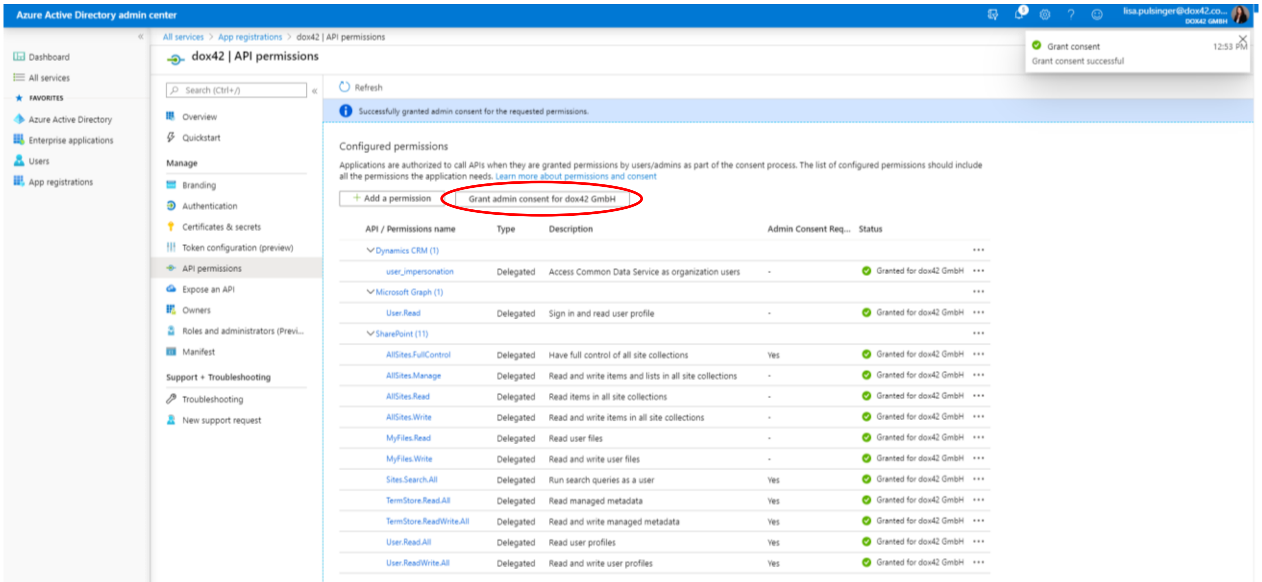


Please select the permissions according to your requirements and systems you are using dox42 with.

The dox42 server requires SharePoint read and write rights for couple of output actions! (SharePoint Save Action, writing meta data). Please grant the following delegated permissions: AllSites.Read, AllSits.Write, MyFiles.Read, MyFiles.Write.



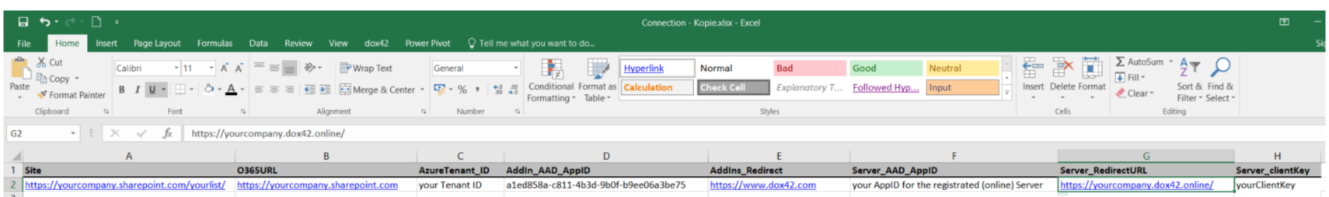
Next click on "Grant Admin Consent" for Your Company, to give your application the full permissions (Alternatively you can also later on click on "Consent" within the dox42 Add-in AAD connection).



Your app registration is complete now, next you need to configure your dox42 Server accordingly.

6.1.6. Excel Config File

We recommend using this file to integrate all the information dynamically in your dox42 Add-In while connecting to Dynamics CRM|D365 CE using AAD. That saves a lot of time during the template design process and avoids copy & pasting. Please make sure to encrypt your Client Secret with the dox42 Crypto Data Source, before storing it there. You can find a sample of a config file in the CRM_ProductList_JSON_sampletemplate folder of your download package.



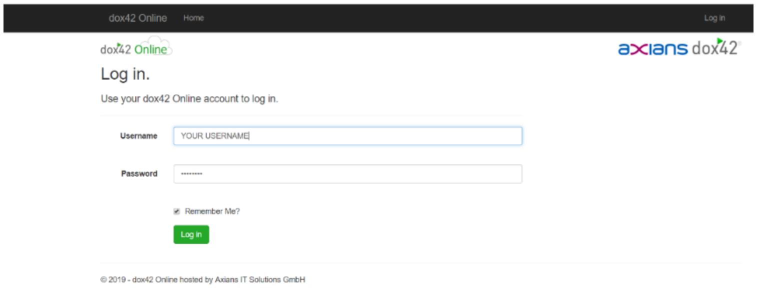
6.2. Further information AAD App Registration

https://blogs.msmvps.com/windsor/2017/03/12/walkthrough-building-a-custom-web-api-for-use-with-sharepoint-online/

6.3. dox42 Online Configuration

Once your set-up for your AAD app is finalized, you need to complete the configurations in your dox42 Server. If you work with dox42 Online, follow this chapter. Otherwise configure your web.config as shown in chapter 6.5.

Please log into your dox42 Online management app with the user name and password received from dox42. The URL for your management app look similar to this: https://yourcompany.dox42.online/admin



6.3.1. Add your AAD App registration settings

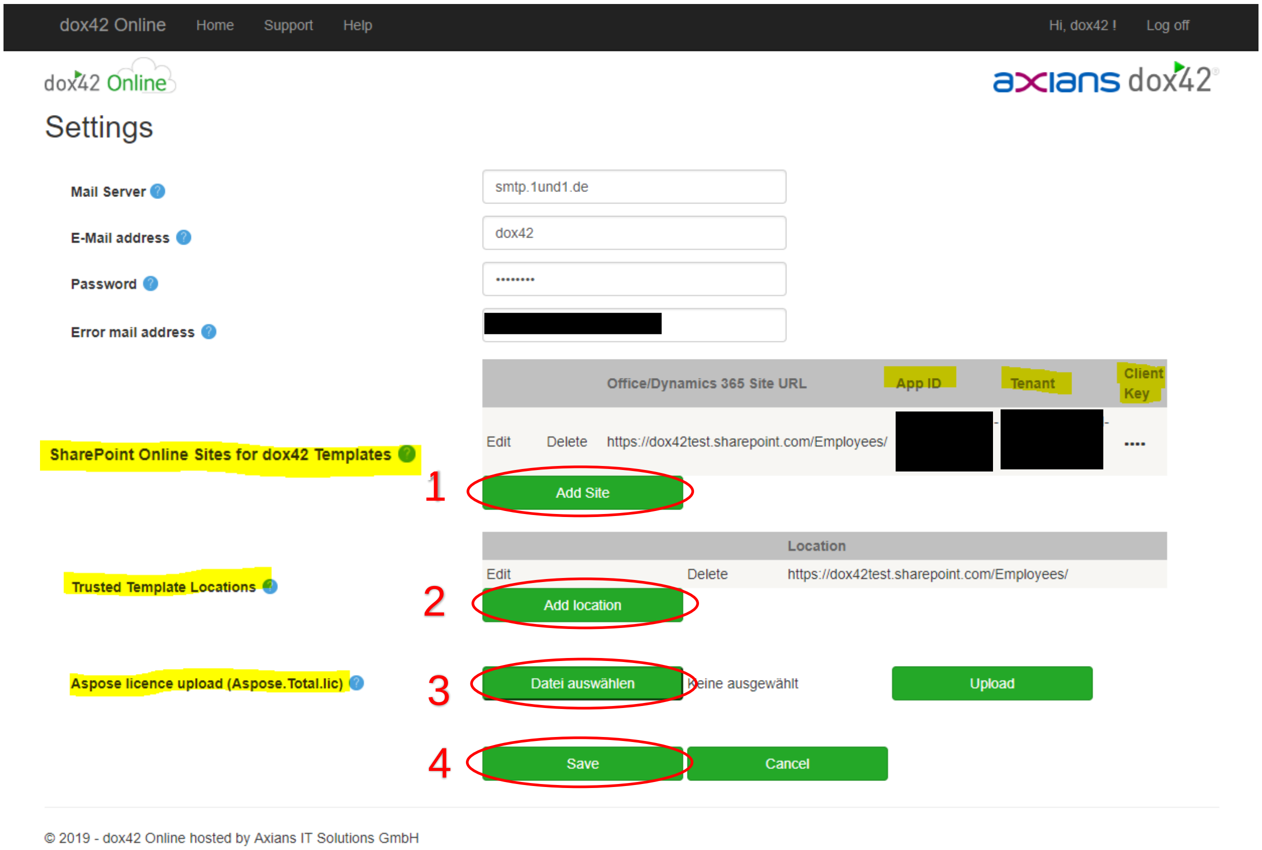
1. Click on “Add Site” and enter your SharePoint sites, where you call your dox42 templates from. Please make sure to add a Slash (/) in the end of the site URL. If you call templates from various SharePoint sites, please add all of them.

   Each SharePoint site needs to be added with the App ID, Tenant ID and the generated Client Secret of the App registered in the Azure AD Admin Center (see chapter 6).

2. Configure your trusted template locations. Your templates have to be stored on SharePoint Online, hence your trusted template location could be https://yourcompany.sharepoint.com/, or you could also specify the exact SharePoint site.

3. Upload your Aspose license (not applicable for trial installations)

4. Click on “Save” at the bottom of the page


dox42 Online
Home
Support
Help
Hi, dox42 !
Log off
dox42 Online
axians dox42
Settings
Mail Server
smtp.1und1.de
E-Mail address
dox42
Password
Error mail address
[redacted]
Office/Dynamics 365 Site URL
App ID
Tenant
Client Key
SharePoint Online Sites for dox42 Templates
Edit
Delete
https://dox42test.sharepoint.com/Employees/
[redacted]
[redacted]
1
Add Site
Location
Trusted Template Locations
Edit
Delete
https://dox42test.sharepoint.com/Employees/
2
Add location
Aspose licence upload (Aspose.Total.lic)
3
Datei auswählen
Keine ausgewählt
Upload
4
Save
Cancel
© 2019 - dox42 Online hosted by Axians IT Solutions GmbH

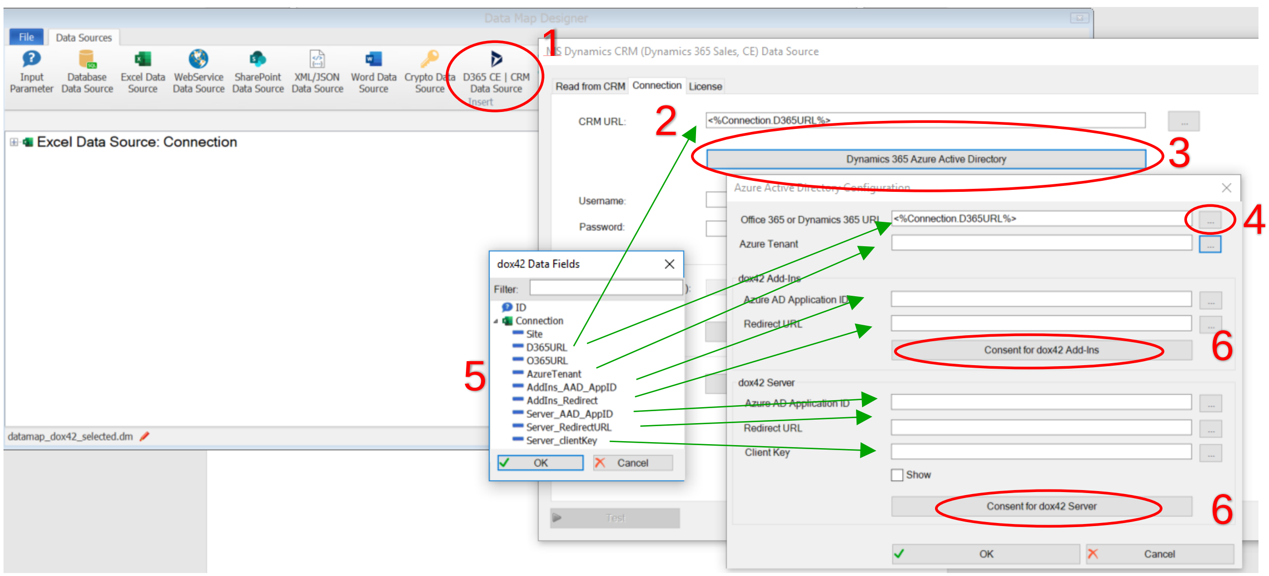
6.4. Configure Azure AD in dox42 Data Map Designer

Now you need to enter the created information in the dox42 Add-In Data Map Designer

6.4.1. Option 1: Using an Excel config file filling in the information dynamically

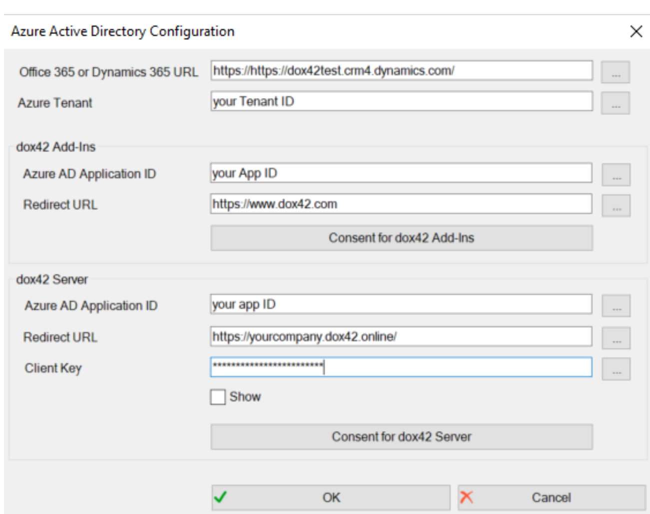
After connecting the Excel config file, select D365 CE|CRM data source within the Data Map Designer (1). Then fill in your CRM URL (2), Click on "Dynamics 365 Azure Active Directory" (3) and fill in the fields by clicking on "…" (4) and select them from your Excel data source as shown below (5).

After you have selected your values, click on Consent for both the Add-in and Server (6). **Dynamics admin rights are required. This step can be skipped, if you clicked on "grant permissions" within the AAD admin center already (see Chatper 6.1.5).**



6.4.2. Option 2: Using Copy Paste

After step 3 on Option 1, you also can copy the information directly into the AAD Configuration without using the Excel Config file:



We recommend to encrypt your Client Key with the dox42 Crypto Data source!

After completing the fields, don't forget to click on Consent for both the Add-in and Server. **Dynamics admin rights are required**. **This step can be skipped, if you clicked on "grant permissions" within the AAD admin center already (see Chatper 6.1.5)**.

6.5. Configure Azure AD Access for dox42 On-Premise Server in Web.config

If you use AAD with a dox42 on-premise Server, you need to adjust the web.config of your Server.

ConfigSection:

```
<configSections>

        . . .

  <section name ="azureAD" type ="dox42.Core.Utils.AzureADSectionHandler,dox42Core"/>
</configSections>
```

Azure AD Section:

```
<azureAD>

    <add      resource365="https://mytenant.sharepoint.com"
              appID="…"
              tenant="…"
              clientKey="*********************************" />
</azureAD>
```

7. Integrating dox42 into your D365 CE or Dynamics CRM (via dox42 Solution)

dox42 has developed a solution for Dynamics CRM (D365 CE) that allows for easy integration of your dox42 calls into your CRM interface.

7.1. Input Parameter for your dox42 templates

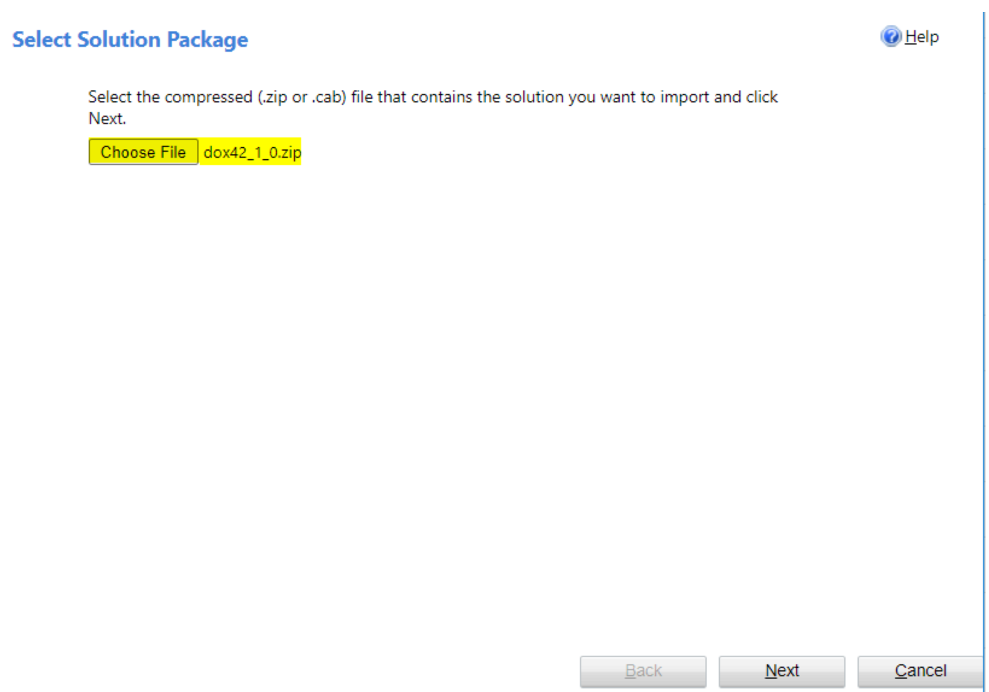
The dox42 solution has specified **"Id" as standard name for the input parameter**, and pulls the GUID of your selected entity. When setting up templates**, please name your input parameter accordingly**.

If you generate a document from a **list selection with more Ids please specify "RequestBody"** as input parameter name in your template.

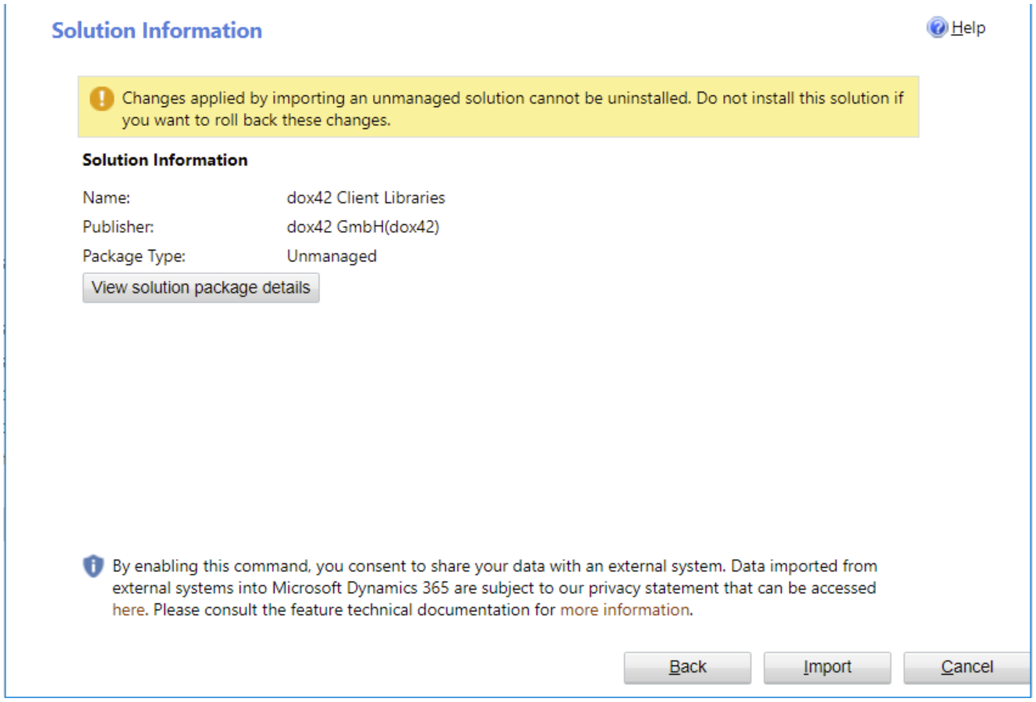
Per default, the dox42 solution pulls the user Id of the logged in user and the CRM environment as additional input parameters. You can use them to impersonate the CRM user in your data sources (see 4.1) and dynamically select the CRM environment you are connecting with. You can change this configuration in the dox42 client libraries of your dox42 solution.

7.2. Import the Solution

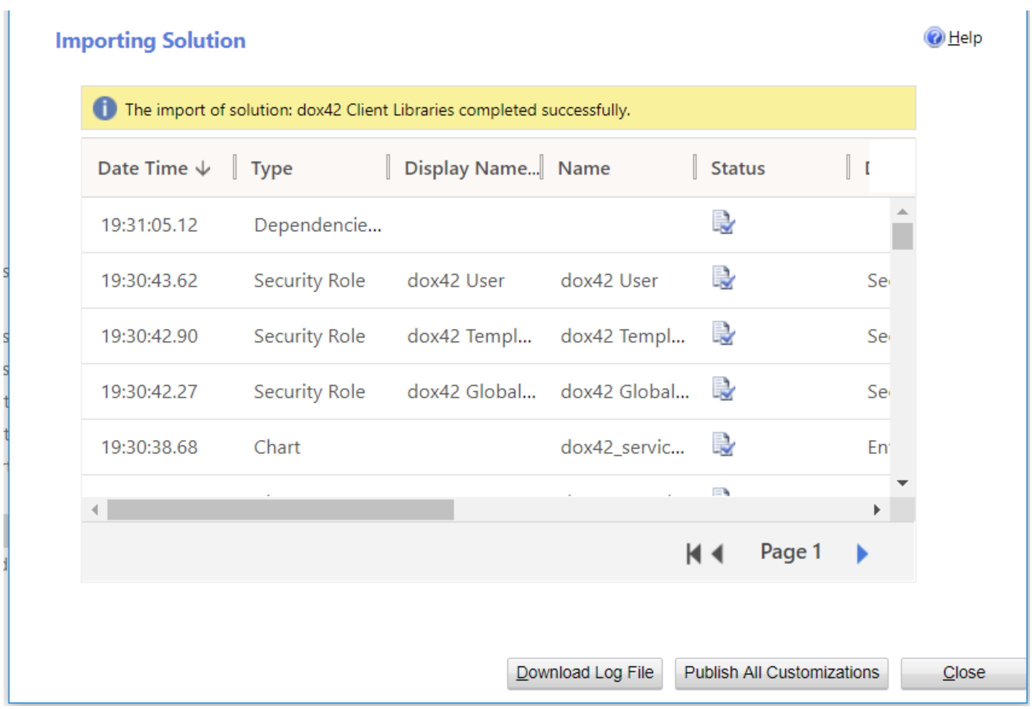
Import the dox42 Solution (Zip Folder dox42_1_Versionnumber.zip)into your Dynamics 365:



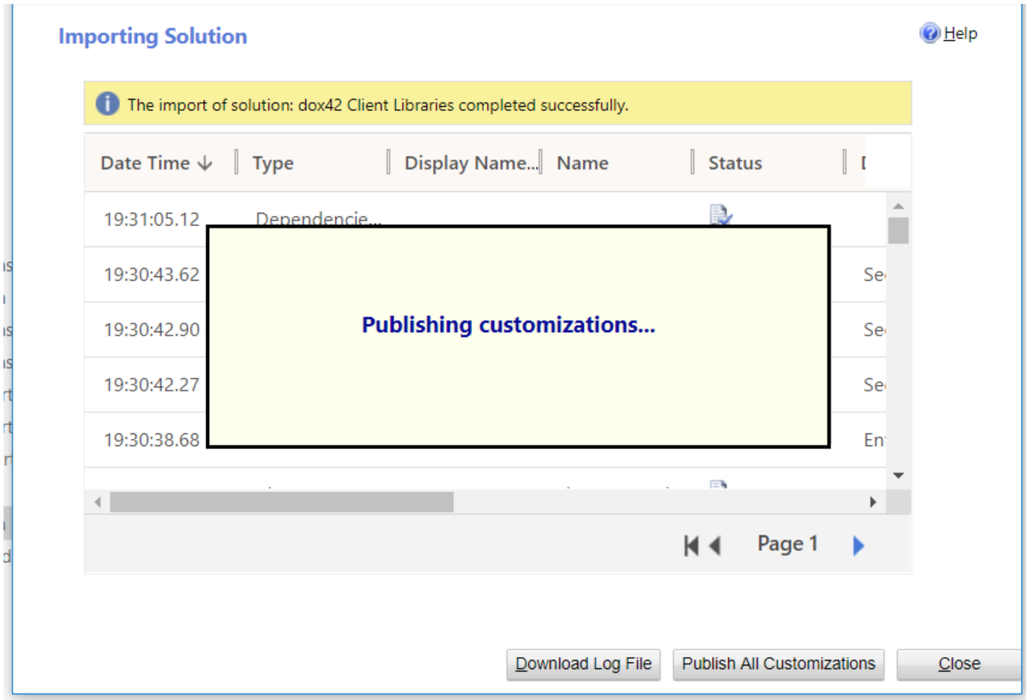
Choose the dox42 zip file and click next.



Click Import to import the solution.



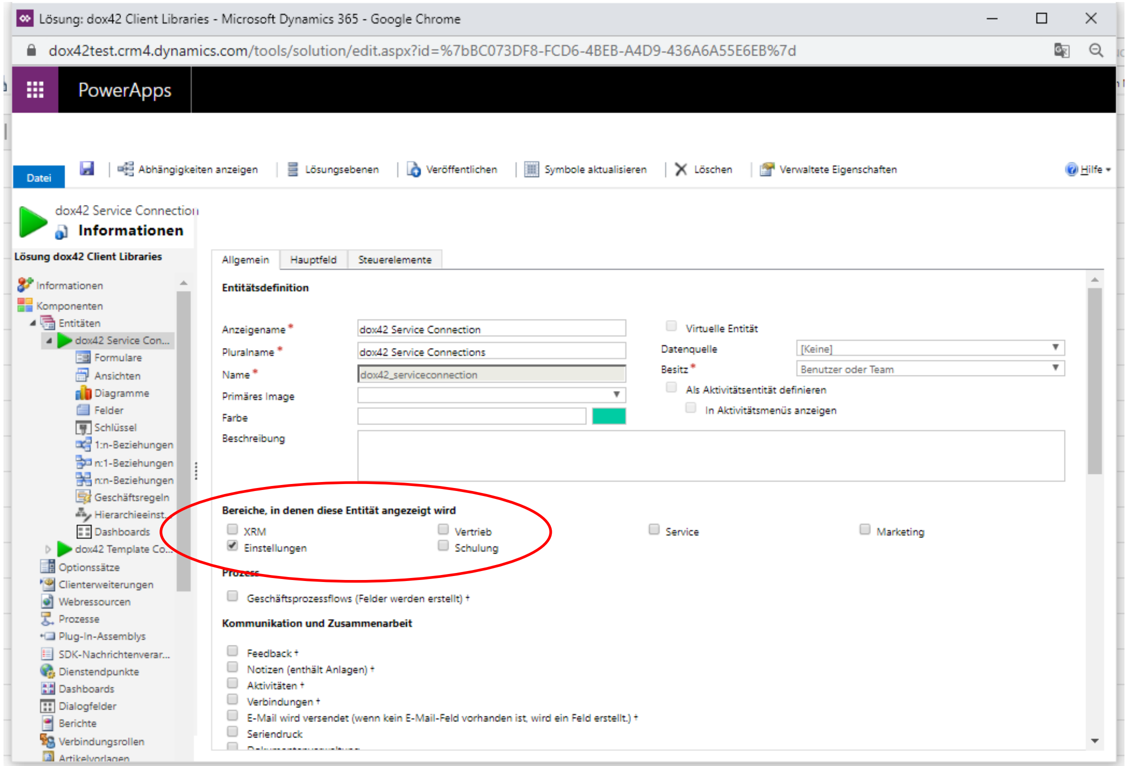
After the import is finished click “Publish All Customizations”.



After the publishing has finished (the overlay “Publishing customizations…” disappears), click close to close the import wizard.

If your system is in English, your entities “dox42 Service Connection” and “dox42 Template Connection” will automatically appear in the Settings area.

If your system is in German (or any other language), please click on your entities “dox42 Service Connection” and “dox42 Template Connection” and select in which areas those entities should appear (e.g. in the Settings menu). (see German screenshot below).

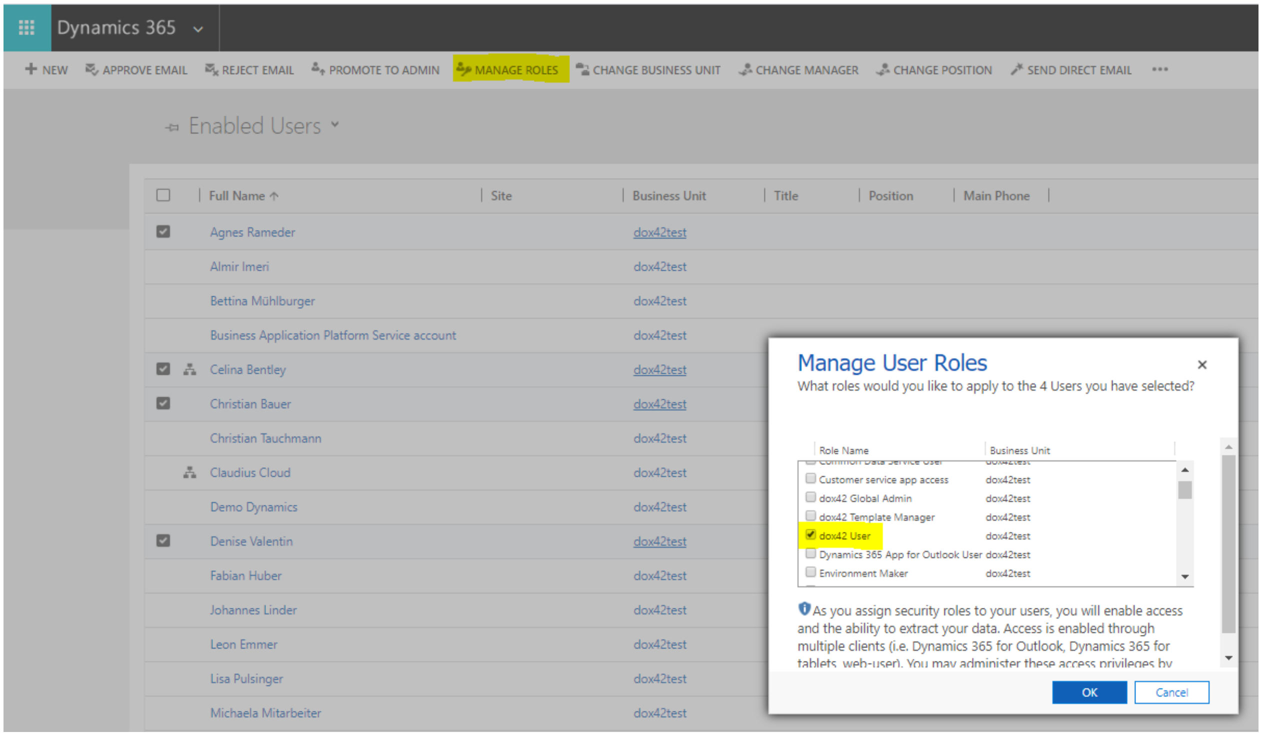


7.3. Security Roles

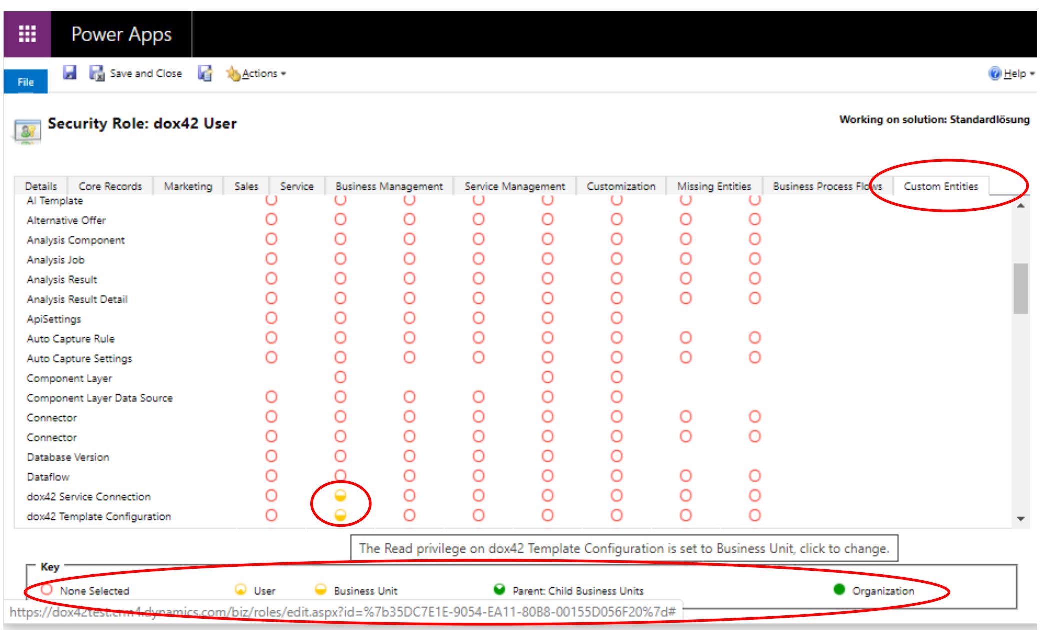
The solution also contains security roles which regulate the access to the two dox42 entities “dox42 Service Connection” and “dox42 Template Connection”. The dox42 Global Admin has full rights for both entities, whereas the dox42 template manager can edit dox42 template configurations, but can only read service connections. **The dox42 User role only has read only permissions on both entities, and needs to be assigned to all users generating documents.**

dox42 Template Configuration	dox42_templateconfig	Entität
dox42 Service Connection	dox42_serviceconnecti...	Entität
dox42 Template Manager	dox42 Template Mana...	Sicherheitsrolle
dox42 User	dox42 User	Sicherheitsrolle
dox42 Global Admin	dox42 Global Admin	Sicherheitsrolle
dox42_arrow32.png	dox42_arrow32.png	Webressource
dox42_clientlib.js	dox42_clientlib.js	Webressource
dox42_adal.js	dox42_adal.js	Webressource
dox42_arrow16.png	dox42_arrow16.png	Webressource

Manage your security roles by switching to the menu **Settings > Security > Users**. Then select your desired users, click on Manage Roles and add the dox42 Security Roles to the users.

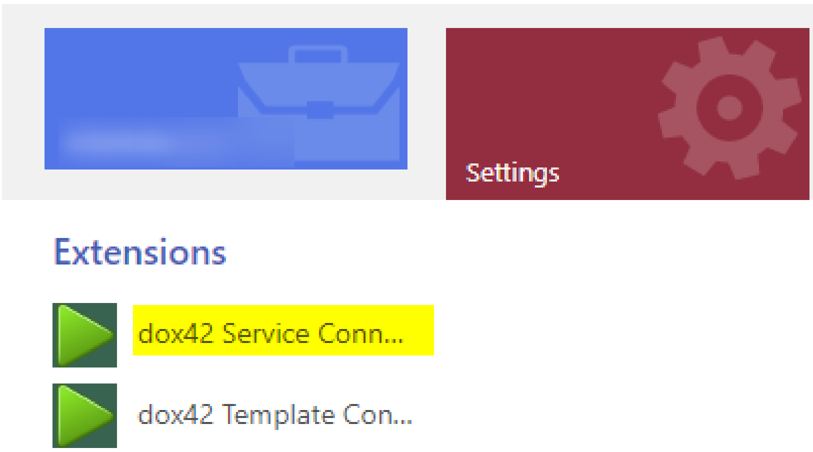


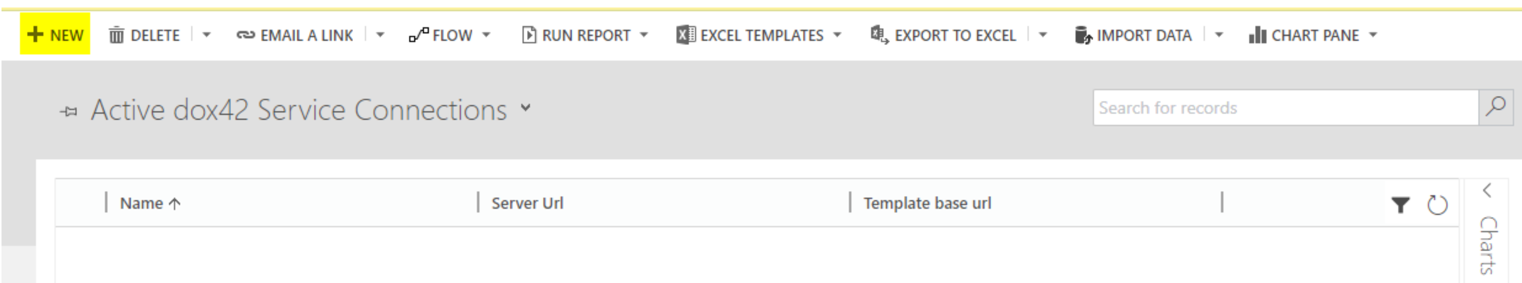
By default the rights for the “dox42 User” and “dox42 Template Manager” are set on business unit level. Should you require the rights to be set on organization level, please switch to Settings > Security > Security Roles, select the desired security role, move to the “Custom Entities” Tab and click a few times on the rights until they are set on the appropriate level. A green dot indicates rights on organizational level.

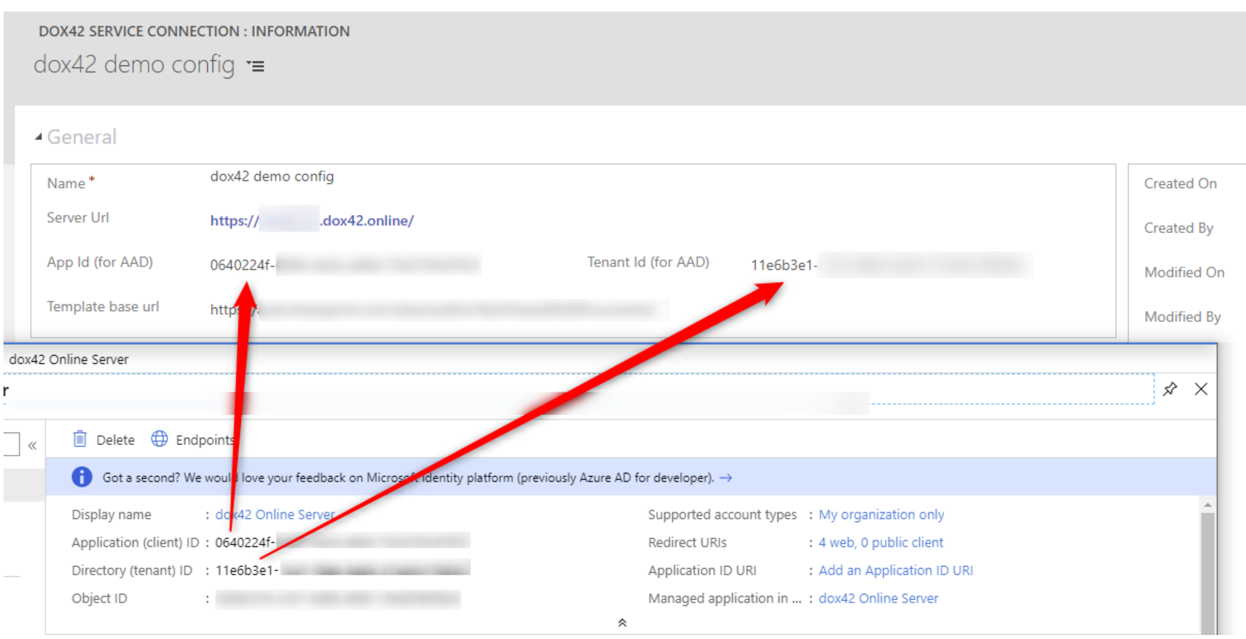


7.4. Adding the dox42 Server configuration to Dynamics 365

Add a new dox42 Service Connection:



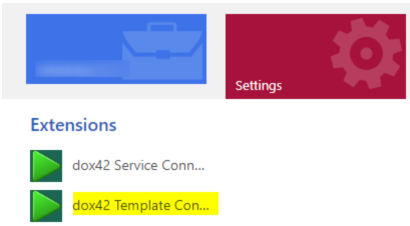


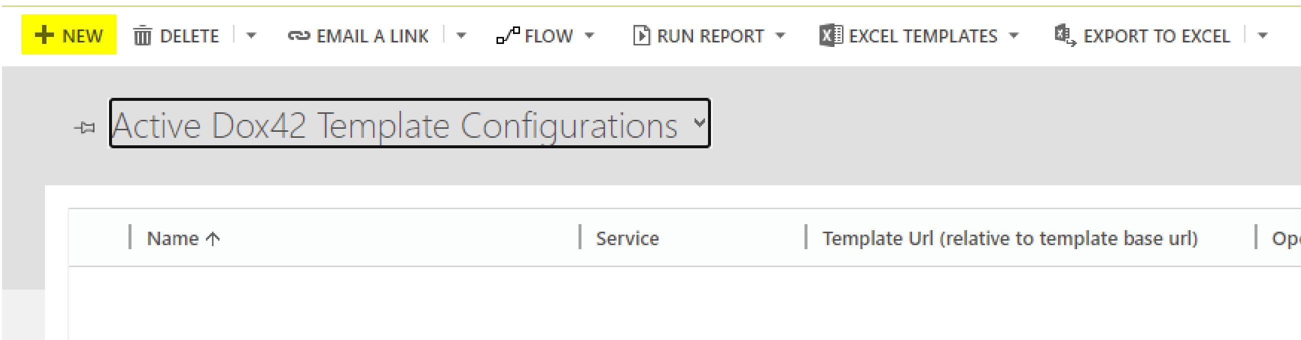


For instructions on your dox42 app registration with AAD, please follow the steps mentioned in Chapter 6.

7.5. Add a template configuration to Dynamics 365

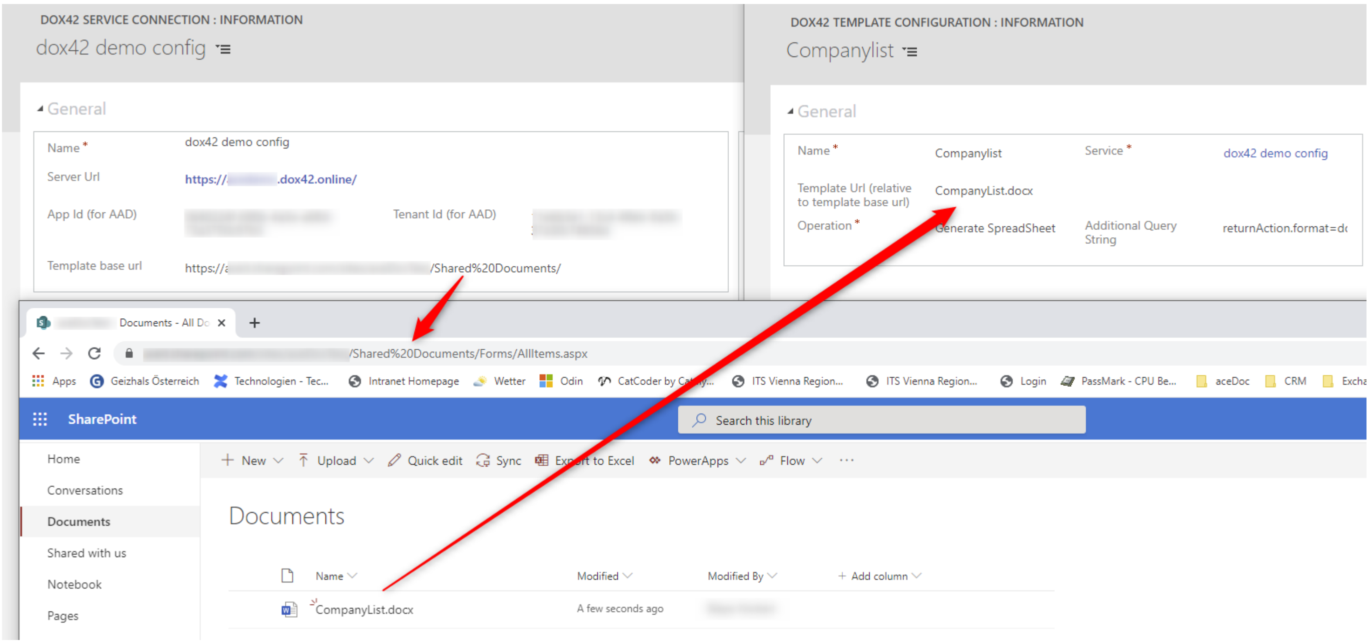
Add a new dox42 Template Configuration:





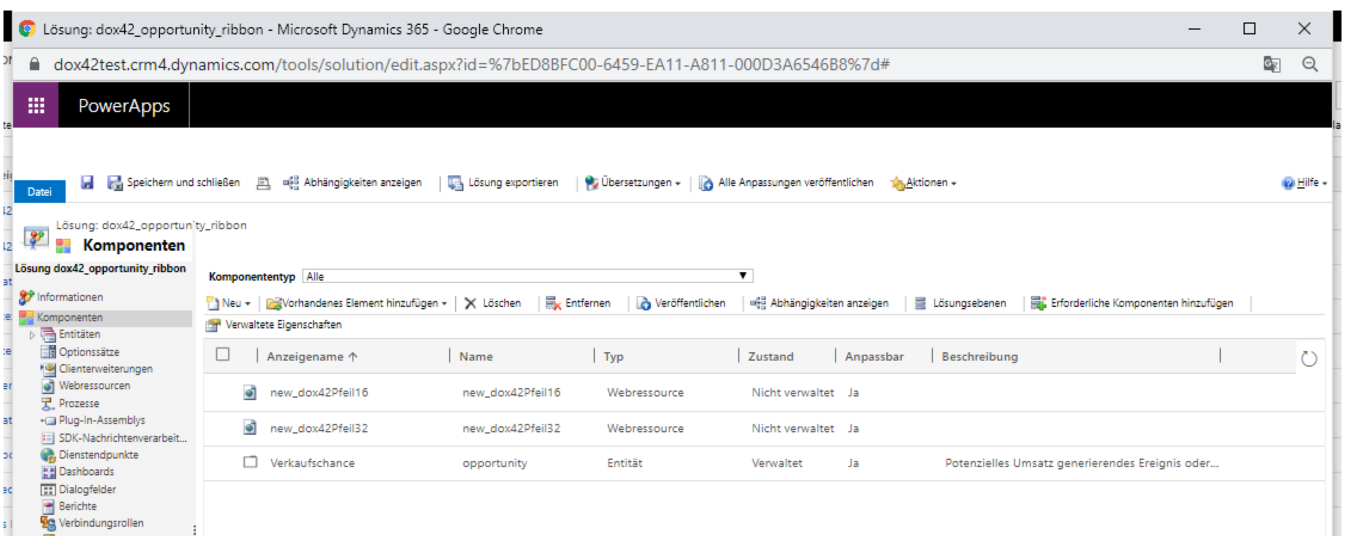
Enter the Values for your dox42 Service, Template, Http Method, Operation and Query String.

- **Name: The name of the template configuration has to match the name you will use in the ribbon button command action (see 7.6).**
- Location of the template: The location of the template is build out of the service connection (Template base url) and the Template Url of the template configuration. These two values are concatenated. If you are generating Excel spreadsheets, please specify the path of the data map.
- Http Method: Choose if your dox42 call should use the method “GET” or “POST”. If you generate a document from a list with several Ids please specify “POST”. Selecting “Auto” ensures that whenever you pass a list of Ids, the request method will be POST, otherwise GET is used automatically.
- Operation: Use “Generate Document” for Word templates, “Generate Slides” for PowerPoint templates and “Generate SpreadSheet” for Excel templates.
- Additional Query String: You need to define your dox42 Output actions here. E.g. if you want to return your document as pdf, the Additonal Query string looks like this: ReturnAction.Format=pdf. Find all dox42 parameters in the [dox42 Server documentation.](#) In Chapter 5 of this documentation you can find the dox42 CRM output action for attaching documents as an annotation to an entity.



7.6. Add the Ribbon Button with Ribbon Workbench

First, set up a new solution in your Dynamics settings (Settings > Solutions > New) and add the entity to which you want to add your dox42 button. You can also upload the icons for your ribbon buttons here.

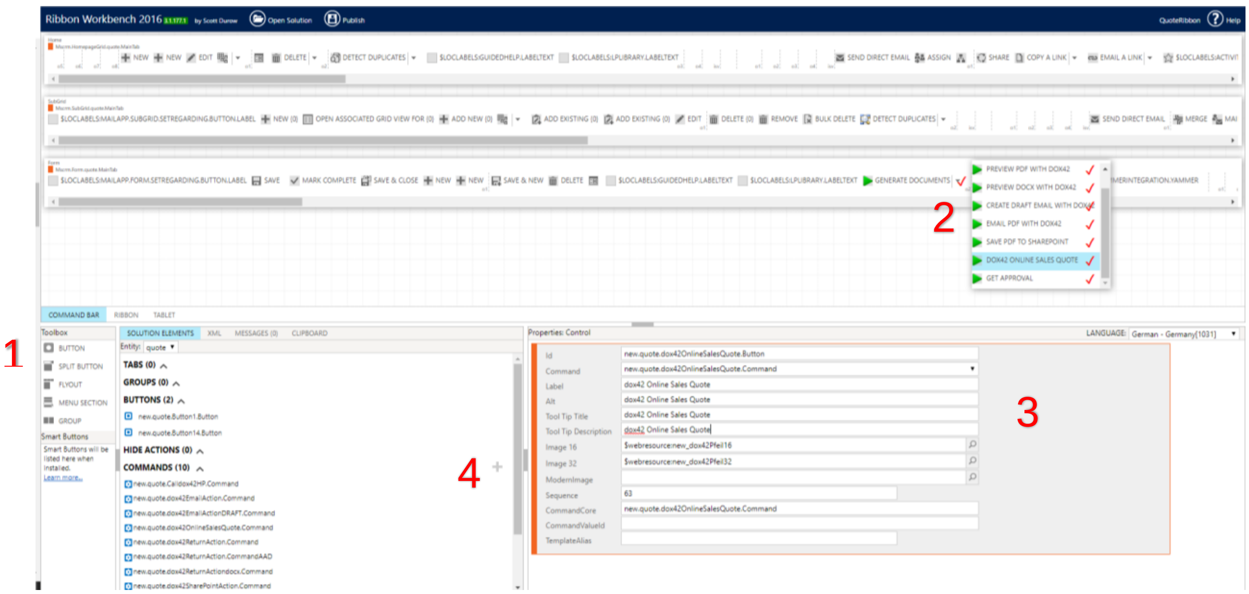


Next, open Ribbon Workbench from your Settings>Customizations page in Dynamics (You need to install it separately to your CRM.)

Open your newly added solution.

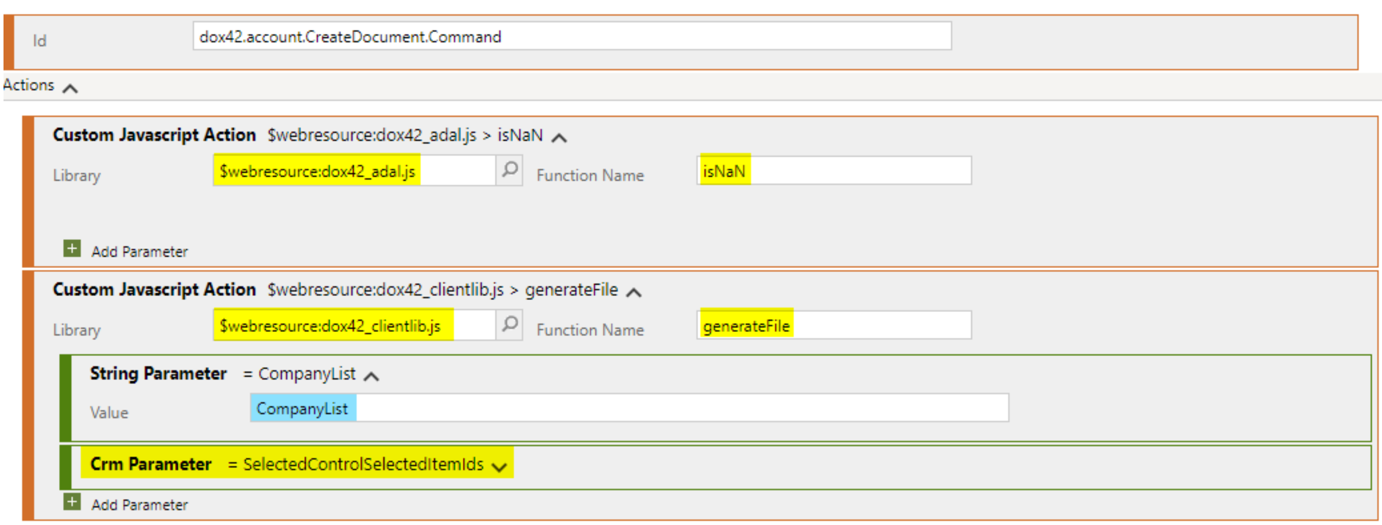
First, add a button (1) by dragging it to the desired position on your ribbon (2) and insert information like an ID, label, description and icon (3).

If you want to add a drop down button, choose “Split Button” (1) and drag it to the desired position on you ribbon (2) , then drag a “Menu Section” (1) to the Split Button. Next, you drag more buttons (1) to the drop down area of your Split Button (2) and configure them as described below (3).



Next you need to add your commands to the button. Click the + sign in the menu Command Bar > Solution Elements in the lower left corner of your screen (4).

For the CommandAction define:



The first JavaScript Action is isNaN from the Library dox42_adal.js.

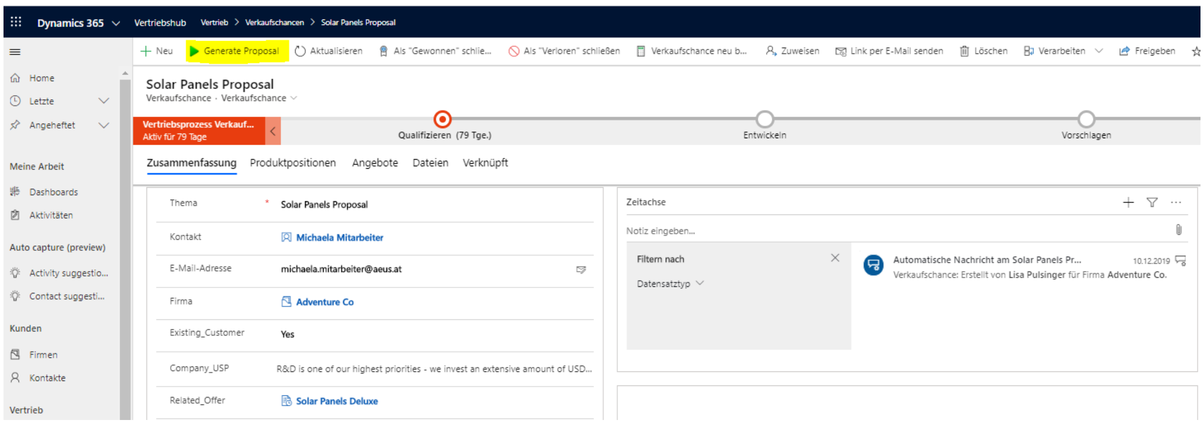
This loads the ADAL script.

The second JavaScript Actions is generateFile from the Library dox42_clientlib.js.

Pass the name of the Template configuration (configured as dox42 Template – see 7.5) as first parameter and the SelectedControlSelectedItemIds (Crm Parameter) as second parameter to the generateFile method.

You can continue this with as many dox42 commands as you may need. Next, publish your solution (click on Publish in the upper left corner of your Ribbon Workbench solution).

If you switch back to your CRM page, your newly added dox42 buttons will appear in the command ribbon.

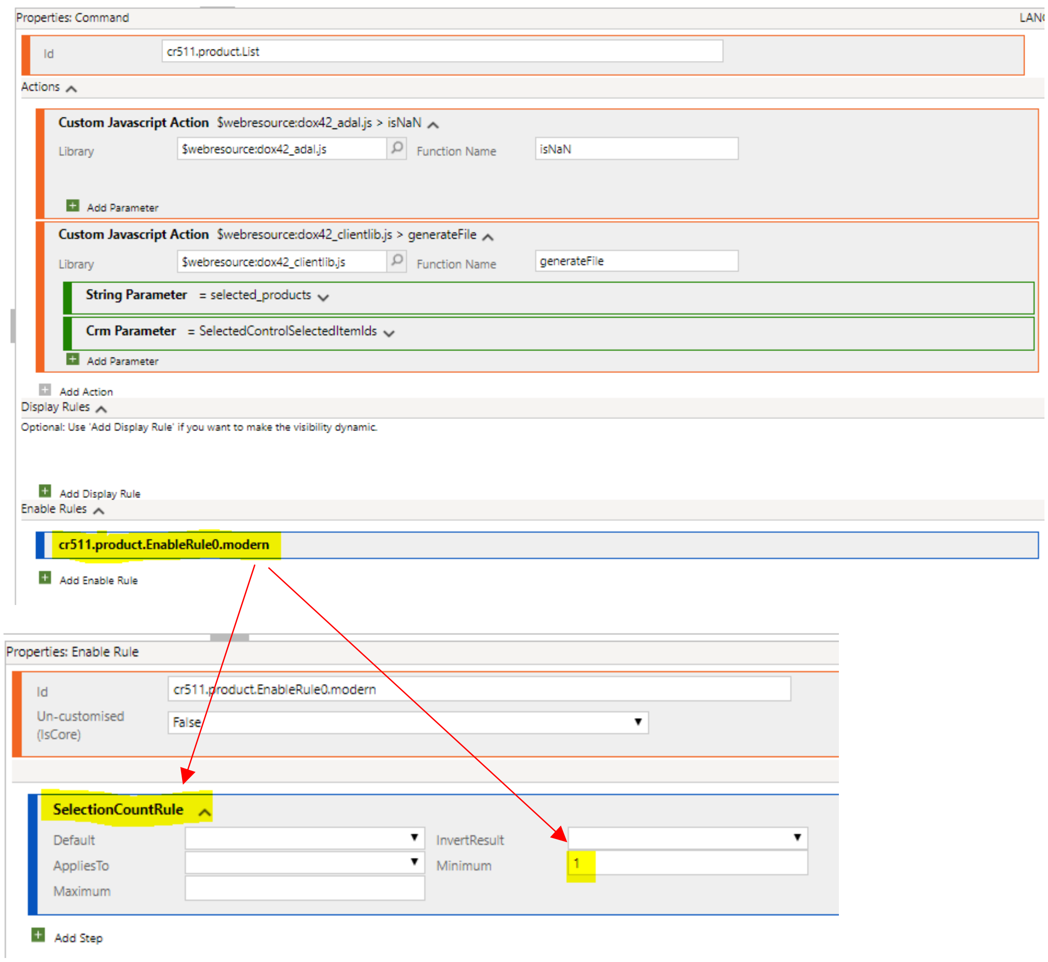


7.6.1. Adding Ribbon buttons to lists

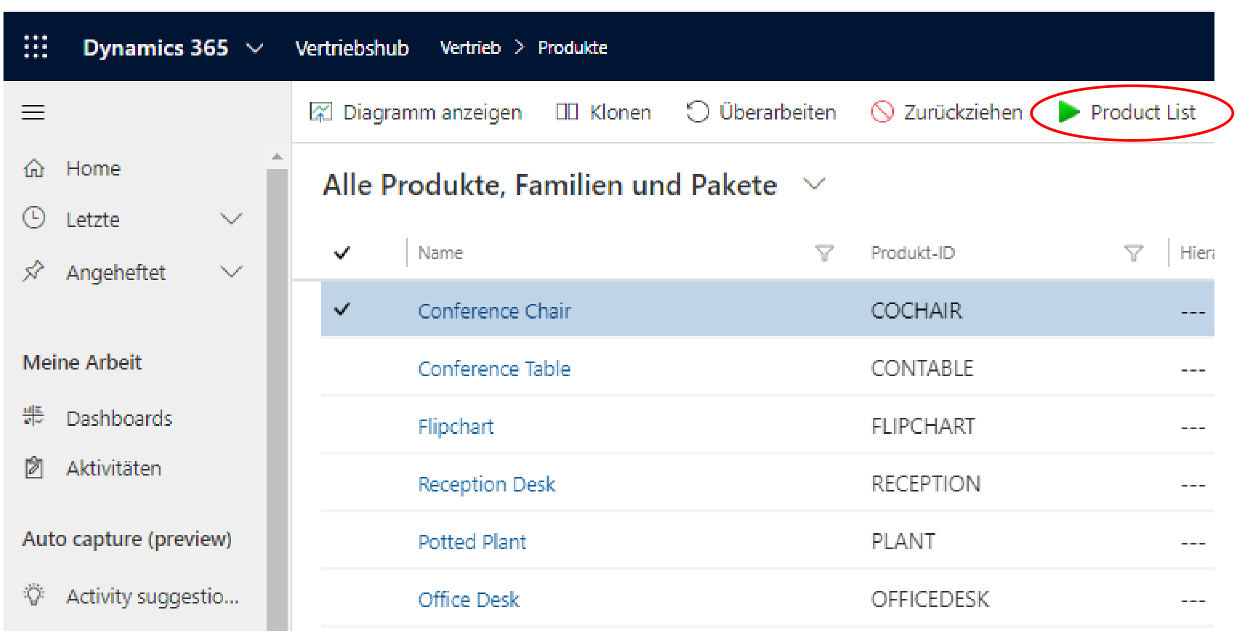
When adding dox42 buttons to lists, which allows you to select one or several items for your document generation, please use the **input parameter "RequestBody**" instead of "id" in your document template. Furthermore, you will need to add a JSON data source to your template. You can find a sample template in your download package (Folder CRM_ProductList_JSON_sampletemplate). In your dox42 template configuration in CRM, specify "Auto" or "POST" as Http Method (see Chapter 7.5).

In Ribbon workbench, instead of placing the button on the form, you need to place it on the homepageGrid.MainTab of your entity (the top ribbon displayed in your Ribbon Worbench set-up).

If you insert the button to a Classic UI CRM environment, please follow the approach described above – see 7.6. For your button to be shown in a Unified UI CRM environment, you need to add a **Display enable rule** (SelectionCountRule with a Minimum of 1) to your button command. This will have the effect that your button in Unified UI environment will be shown as soon as you select at least one item:



Again, after you publish your solution, your button will be shown in the ribbon of your selected form.



7.6.2. More Information on Ribbon Workbench

If you are looking for a more detailed introduction to Ribbon Workbench, please follow this link.

8. Adding a dox42 Call via IFRAME to your Dynamics CE|CRM Forms

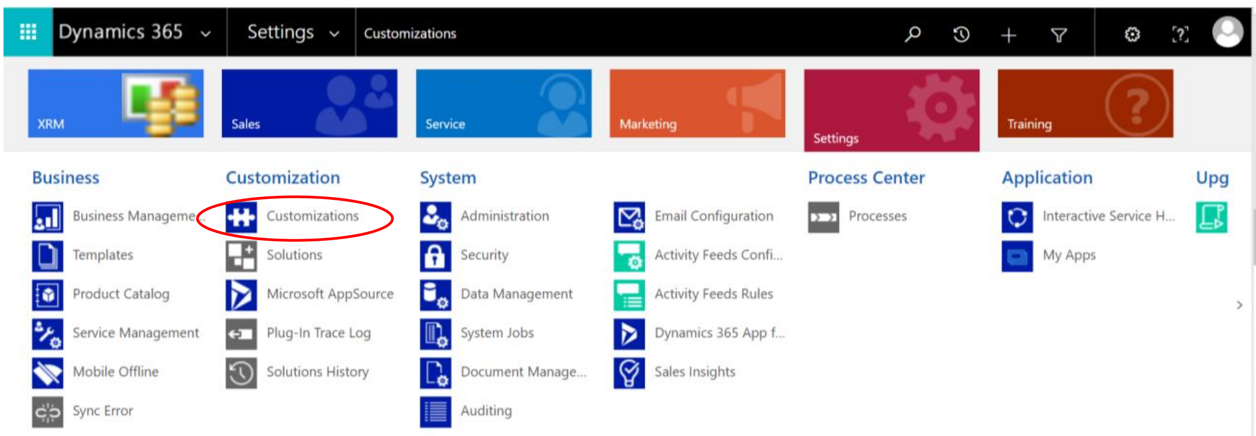
As an alternative to chapter 7 and if you wish for your dox42 calls to be added directly to an entity form, rather than via a Ribbon Workbench button in the command bar, you can integrate dox42 calls via an HTML webresource/IFRAME to your entity form.

8.1. Configure the JavaScript Interface

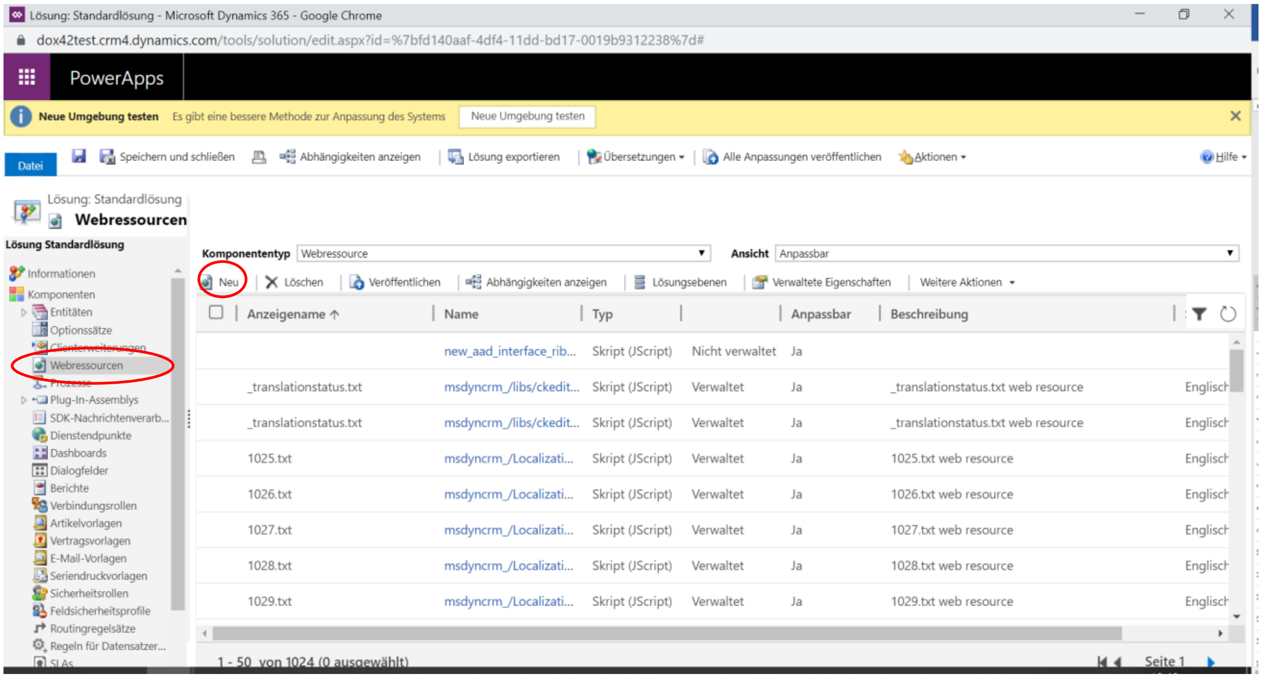
First, configure your JavaScript Interface. For this, please follow the instructions for the AzureAD_dox42_javascript_interface mentioned in the Azure Active directory documentation. You can find the JavaScript in your download package.

8.2. Set up an HTML webresource for the JavaScript Interface

For this please change to Settings > Customization > Customize System.



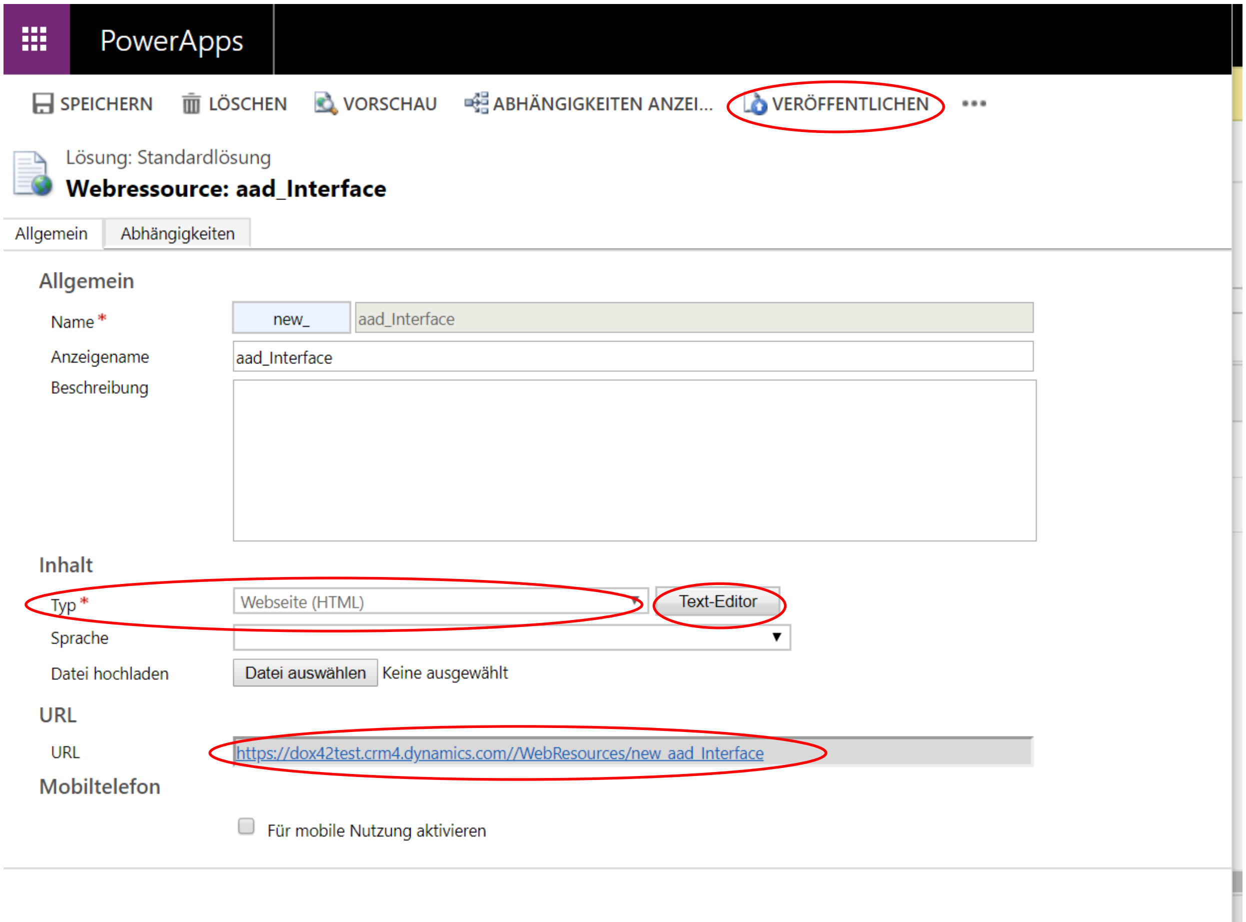
Now a new window opens with all your custom components of your CRM. Click on the web resources button in the left context menu and after that click on New.



Now add your previously configured AzureAD_dox42_javascript_interface JS as **Type HTML** webresource.

Click the button “Text-Editor” to add your JavaScript/HTML Code.

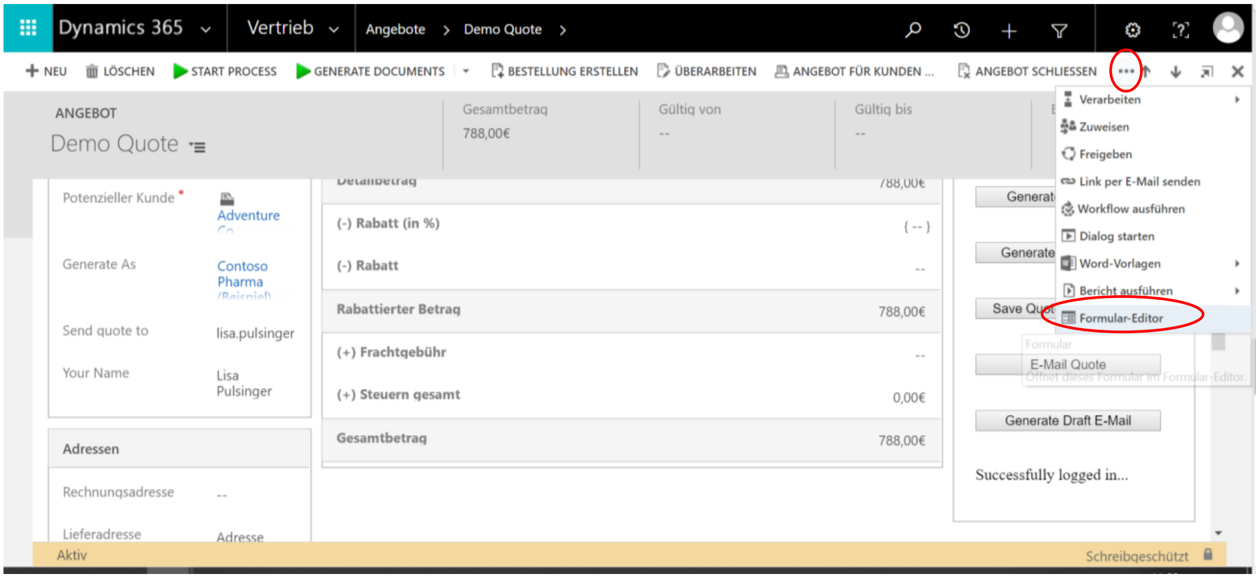
Save and Publish your webresource.



You need to copy the URL of your newly added web resource and add it as reply URL to your Azure Active Directory App Registration.

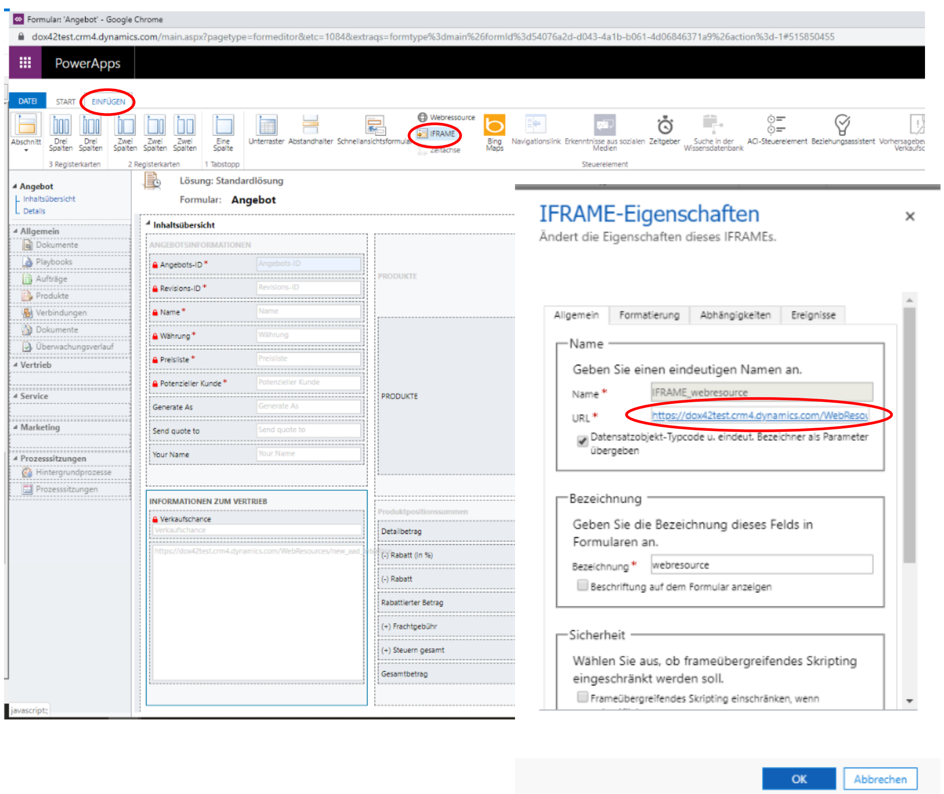
8.3. Add the web resource as IFRAME to your CRM form

Next you need to insert your web resource to your CRM page as an IFRAME using the D365 CRM form editor. First open the desired form editor, e.g. from your quote overview.

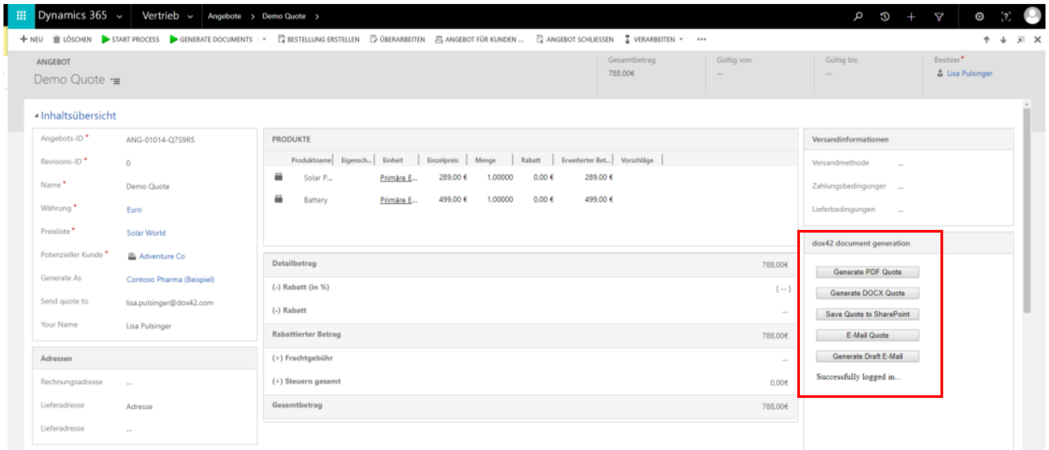


Now select the area where you would like the webresource to appear on your form, click the "Insert" ribbon in the menu bar and select IFRAME.

Now configure your IFRAME settings. For the URL please add the URL of your previously added webresource, as described in chapter 8.2.



Click OK, Save and Publish in order to have your dox42 calls appear on your form.



9. Support

Should you have any questions, please do not hesitate to contact support@dox42.com. We are happy to help you!

Good luck with dox42!